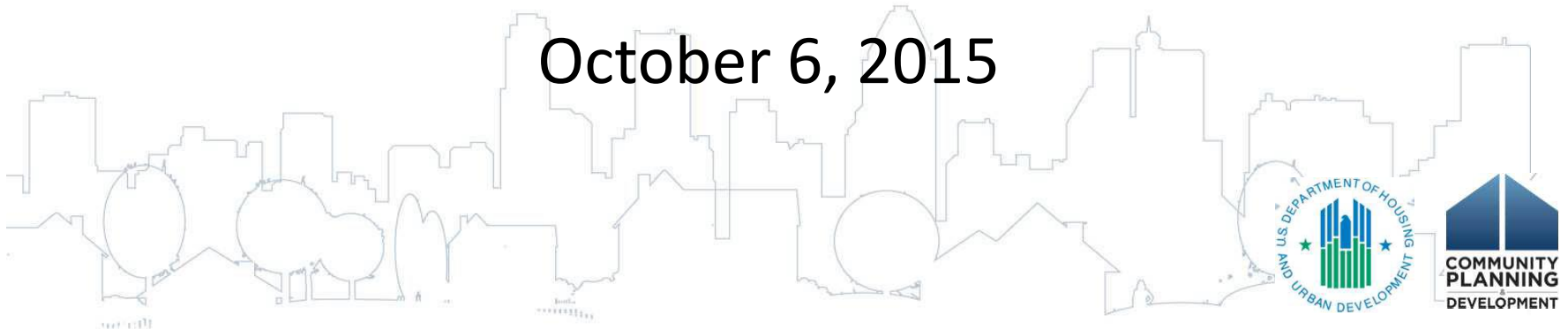


CPD All Grantee Meeting

San Francisco Regional Office

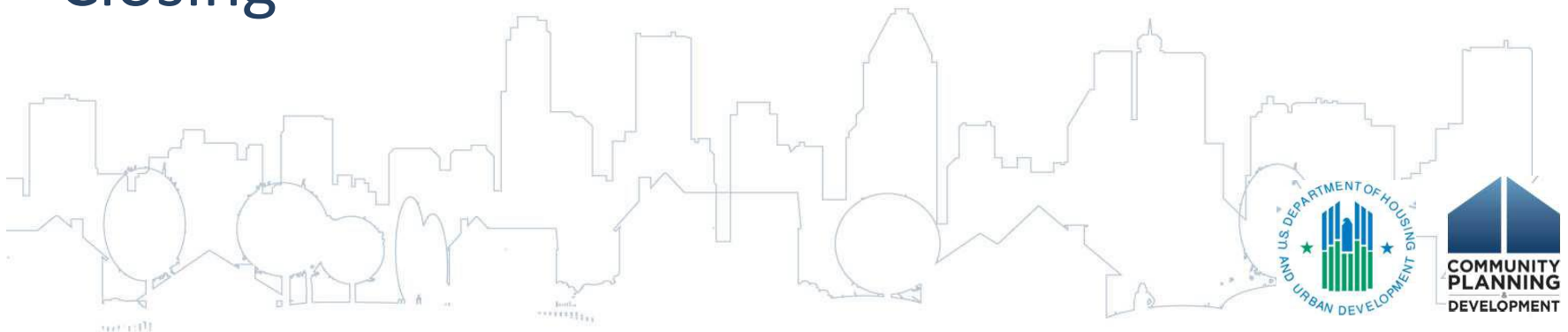
Community Planning & Development (CPD)

October 6, 2015



Agenda

- Welcome from CPD Director Maria Cremer
- Resources on the HUD Exchange
- Homelessness: How to Get to Functional Zero
- Environmental Review Basics
- Office of the Inspector General
- Closing



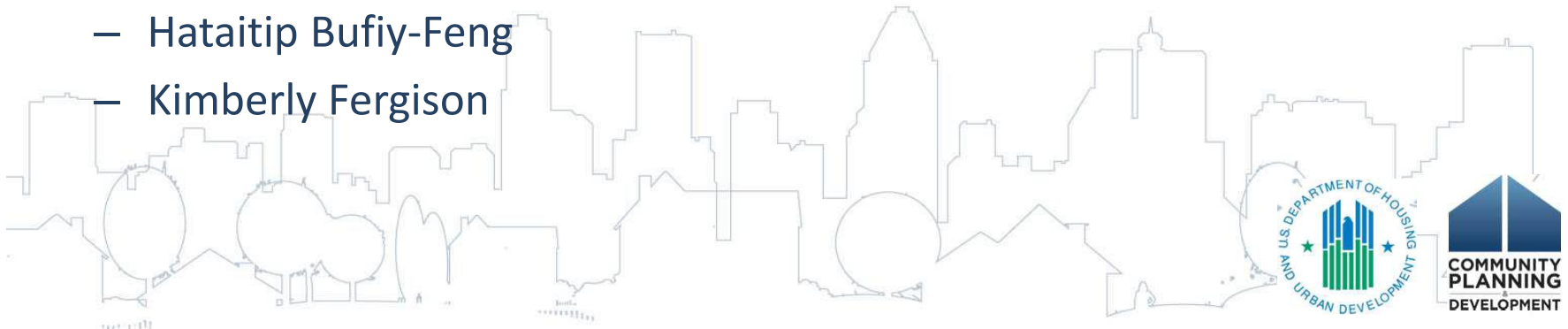
Presenters

CPD

- HUD Exchange
 - Alice Walkup
 - Greg Harrick
 - Noemi Ghirghi
- Homelessness Prevention
 - Hataitip Bufiy-Feng
 - Kimberly Ferguson

Guest Speakers

- Environmental Review
 - Kathleen McNulty
- HUD OIG
 - James Brady



Questions/Troubleshooting

- Question on the subject areas presented?
 - Email larry.wuerstle@hud.gov
 - Q & A from Meeting will be distributed to registrants
- Technical issue accessing the webinar or conference call?
 - Call 415-489-6589
 - Email john.m.burke@hud.gov

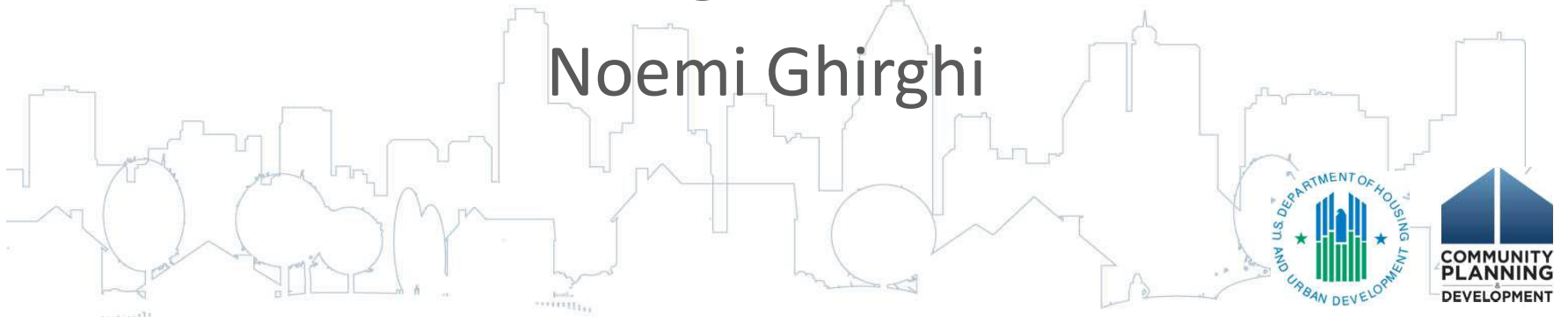


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Alice Walkup

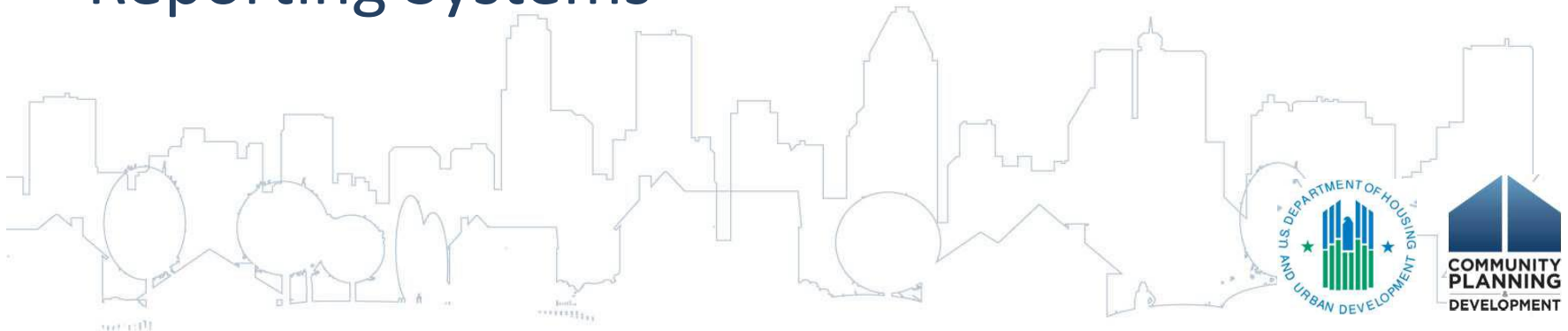
Greg Harrick

Noemi Ghirghi



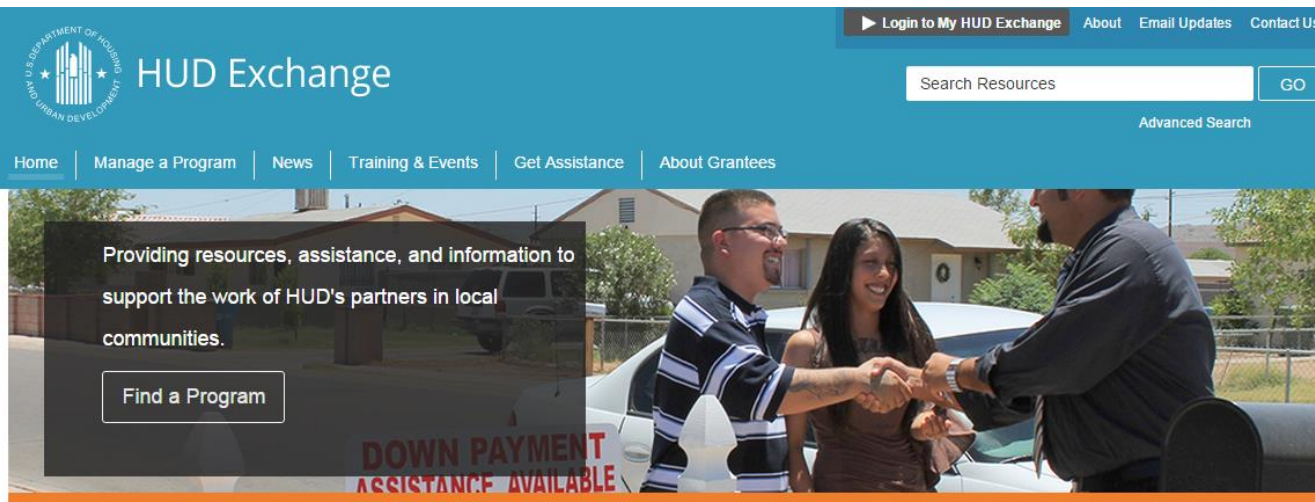
Resources on the HUD Exchange

- Overview
- Training
- Technical Assistance
- Tips & Tricks
- HOME Tips
- Reporting Systems



Overview of HUD Exchange

- www.hudexchange.info
- Resource for information on all CPD Programs
- Good first step in researching an issue you may be encountering



Lead the Way

Lead the Way: Public Housing Agency (PHA) Governance and

National Disaster Resilience Competition

Grant Based Accounting

HUD is implementing grant based

Affirmatively Furthering Fair Housing Final Rule

Overview

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CDBG Entitlement Guides Tools and Webinars

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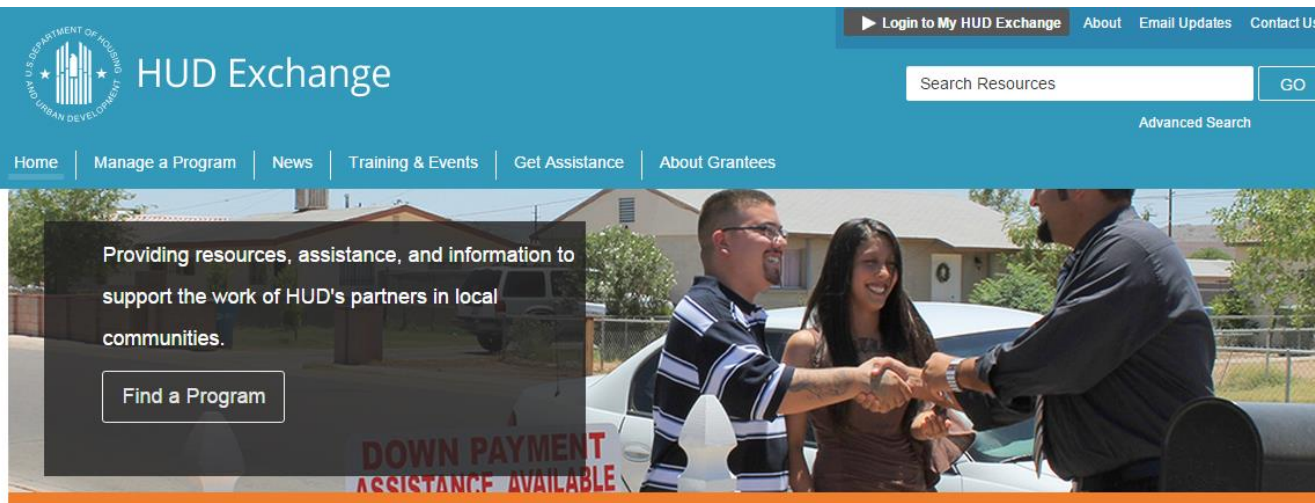
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- Technical Assistance including CoC AAQ
- Tips & Tricks



Lead the Way

Lead the Way: Public Housing Agency (PHA) Governance and Financial Management is a free, online training to help PHA boards and staff fulfill their responsibilities in providing effective governance and oversight.

National Disaster Resilience Competition

The application deadline for invited Phase 2 applicants is October 27, 2015. View resources related to the National Disaster Resilience

Grant Based Accounting

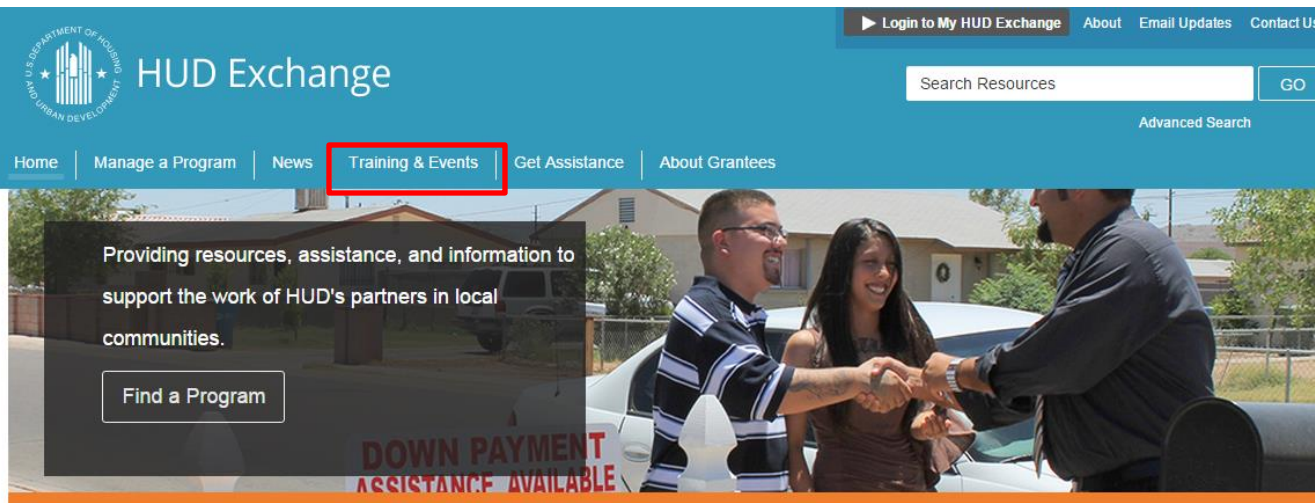
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Affirmatively Furthering Fair Housing Final Rule

View resources related to HUD's recently approved Affirmatively Furthering Fair Housing Final Rule.

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How New Orleans Ended Veteran Homelessness Webinar

Webinar | Posted on August 26, 2015

This webinar will explain how New Orleans ended Veteran homelessness and how your community can too.

NDRC NOFA-specific Webinar: Resources Available to Applicants

Webinar | Posted on August 24, 2015

This webinar will explain how to utilize the NDRC resources on the HUD Exchange website.

NDRC NOFA-Specific Webinar: Approach to Scheduling: Phase 2 Projects

Webinar | Posted on August 18, 2015

This webinar will explain strategies for complying with CDBG-NDR funding requirements.

Third Round Tribal Promise Zones Initiative Stakeholder Webinar

Webinar | Posted on August 14, 2015

This webinar provides an overview of the Third Round Promise Zones designation for tribal applicants.

Third Round Urban Promise Zone Initiative

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31

HIV Housing Care Continuum Regional Meetings – Chicago, IL

August 31 - September 1, 2015

Chicago, IL

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Building HOME: Webinar Series I

Webinar | Posted on September 3, 2015

This is a four-week webinar series presentation of the Building HOME training.

HOME IDIS Grant Based Accounting Changes for FY 2015 and Onward Webinar

Webinar | Posted on August 3, 2015

This webinar will explain the transition from the FIFO accounting method to GBA in IDIS.

CHDO Set-Aside Reservation & Expenditure Deadlines Webinar

Webinar | Posted on April 23, 2015

This HOME webinar discusses CHDO set-aside reservations and expenditure deadlines.

HEROS e-Tutorial: Certifying Part 50 Reviews

Webinar | Posted on July 29, 2014

This session demonstrates how HUD staff can use HEROS to approve and certify environmental reviews completed under 24 CFR Part 50.

HEROS e-Tutorial: Non-Responsible Entity Recipients and Consultants

Webinar | Posted on May 28, 2014

This session demonstrates the user roles for non-responsible entity recipients

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DRGR 2015 Workshops - Newark

September 15-16, 2015

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2014-2015 Building HOME - A HOME Program Primer

In-Person Training | Posted on August 15, 2014

This training provides an overview of the HOME Investment Partnerships Program.

CHDO Workshop: Understanding the 2013 HOME Final Rule

In-Person Training | Posted on March 27, 2014

This training orients attendees to the 2013 HOME Rule's global changes and updated CHDO provisions.

Income Determination in the HOME Program

In-Person Training | Posted on January 14, 2014

This training was developed to give an overview of income determination in the HOME program.

Resale/Recapture in the HOME Program

In-Person Training | Posted on January 14, 2014

This training was developed to give an overview of the resale/recapture provisions in HOME.

Lease Purchase in the HOME Program

In-Person Training | Posted on January 14, 2014

This training was developed to give guidance about lease purchase as part of HOME.

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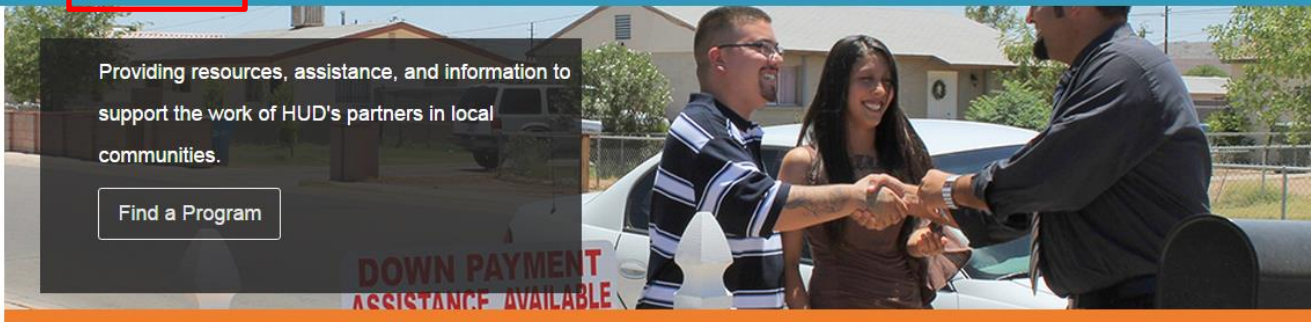
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Manage a Program

Find guidance about HUD programs, cross cutting requirements, activities, and program management topics to help implement your program



Affirmatively Furthering Fair Housing

CDBG, HOME, ESG, and HOPWA State and local government and PHA grantees must meet Affirmatively Furthering Fair Housing (AFFH) requirements.



Affordable Housing

HUD's affordable housing programs include: 811 PRA, HOME, HOPWA, HTF, and NSP, as well as Multifamily Preservation Programs such as RAD and Section 236 Preservation. Multifamily Energy Efficiency Initiatives include the Better Buildings Challenge.



Energy

HUD's energy initiatives include the Better Buildings Challenge and Advancing Renewable Energy in Affordable Housing.



Community Development

HUD's community development programs include: ARC, BEDI, CDBG-DR, CDBG Colonias, CDBG Entitlement, CDBG HUD Administered Non-Entitled Counties in Hawaii, CDBG Insular Areas, CDBG State, NSP, Section 108, and Sustainable Communities Initiative.



Consolidated Planning

The consolidated planning process serves as a framework for community-wide dialogue to identify housing and community development priorities that align and focus funding from CDBG, HOME, ESG, and HOPWA.



Economic Development

HUD's economic development programs include: AEDI, BCCI, BEDI, CDBG-DR, Community Renewal Initiative, EZ/RC/EC, DCCI, EDI-SP Grants, NI Grants, Promise Zones, RHED, RIF, Rural Capacity Building, Section 4 Capacity Building, and Section 108.



Environmental Review

The environmental review process is required for all HUD-assisted projects to ensure projects do not negatively impact the surrounding environment and that the property site itself will not have an adverse environmental or health effect on end users.



Financial Management

Financial Management resources include: Financial Management Curriculum and Grant Based Accounting Requirements.



Homelessness Assistance

HUD's homelessness assistance programs include: BRAC, CoC, ESG, HOPWA, HUD-VASH, RHSP, Title V, and VHPD. Legacy programs include: Emergency Shelter Grants Program, HPRP, S+C, SHP, and SRO. Topics include the Affordable Care Act.

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Continuum of Care (CoC) Program

The Continuum of Care (CoC) Program is designed to promote communitywide commitment to the goal of ending homelessness; provide funding for efforts by nonprofit providers, and State and local governments to quickly rehouse homeless individuals and families while minimizing the trauma and dislocation caused to homeless individuals, families, and communities by homelessness; promote access to and effect utilization of mainstream programs by homeless individuals and families; and optimize self-sufficiency among individuals and families experiencing homelessness.

- [Learn about CoC Program Eligibility Requirements](#)
- [View SNAPS In Focus](#)
- [View SNAPS-Shots](#)
- [View CoC Program Laws, Regulations, and Notices](#)
- [View CoC Program Competition: FY 2015 Funding Availability](#)
- [View CoC Program Competition: e-snaps Resources](#)

CoC Program Training Material and Resources

CoC Program Toolkit

This toolkit provides user guides, tools, webinars, and other resources on the following topics:

- [Introduction to the CoC Program](#)
- [CoC Responsibilities and Duties](#)
- [Determining and Documenting Homelessness](#)
- [CoC Program Components and Eligible Costs](#)
- [Grant Administration \(Includes Recordkeeping and Financial\)](#)

Coordinated Entry Resources

These resources aid in the establishment and operations of a coordinated entry system which provides a process for conducting comprehensive entries of housing and services needs for individuals and families.

CoC Startup Training Webinars

These webinars assist FY 2013/FY 2014 CoC recipients and subrecipients to gain an understanding of grant operations and administration.

CoC News & Announcements

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[HDX: Homelessness Data Exchange](#)

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CoC Program Reports, Program Data and Program Rents

[CoC Awards](#)

[CoC Awards by Program](#)

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CoC Program Toolkit - Grant Administration (Includes Recordkeeping and Financial)

Resources address the new grant administration requirements under the new CoC Program to include recordkeeping, match, and financial management.

Find By Topic

Overview of Grant Administration	▶
Match Requirements	▶
Recordkeeping	▶

Overview of Grant Administration

Resources categorized under Overview of Grant Administration provide introductory, high-level information about administering a CoC Program grant and include a crosswalk between the requirements under the legacy homeless programs and the new CoC Program, the different stages of a grant, recordkeeping requirements, and grant amendments.

CoC Program Environmental Review Flow Chart

This tool provides CoC Program recipients assistance in correctly identifying what level of environmental review is required for their CoC Program project(s). This tool provides links to the following forms: CoC Program 'CEST' Limited Scope Review, Exempt/CENST, EA, and CEST.

Date Published: February 2015

CoC Program Start Up Training Webinars for FY 2013 Funds

The purpose of this training is to assist recipients and subrecipients of Continuum of Care (CoC) Program funds awarded under the CoC Program interim rule (24 CFR part 578) to gain an understanding of the requirements and responsibilities related to operations and grant administration. This training applies to projects awarded with FY 2013 funds under the FY 2013/FY 2014 CoC Program Competition and any future competitions awarded under the interim rule.

Date Published: June 2014

CoC Program Amendments Video

This video provides an overview of the ability of grant recipients and subrecipients to make changes to a project.

Date Published: September 2013

CoC Program: Grant Administration Broadcast

This broadcast provides an overview of the grant administration requirements under the new

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Affirmatively Furthering Fair Housing (AFFH) Final Rule

Overview

Affirmatively Furthering Fair Housing (AFFH) is a legal requirement that federal agencies and federal grantees further the purposes of the Fair Housing Act. This obligation to affirmatively further fair housing has been in the Fair Housing Act since 1968 (for further information see Title VIII of the Civil Rights Act of 1968, 42 U.S.C. 3608 and Executive Order 12892). HUD's final rule provides an effective planning approach to aid program participants in taking meaningful actions to overcome historic patterns of segregation, promote fair housing choice, and foster inclusive communities that are free from discrimination. As provided in the final rule, AFFH means "taking meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Specifically, affirmatively furthering fair housing means taking meaningful actions that, taken together, address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws. The duty to affirmatively further fair housing extends to all of a program participant's activities and programs relating to housing and urban development."

The Assessment of Fair Housing

HUD's rule clarifies existing fair housing obligations with a streamlined process to analyze the local fair housing landscape and set fair housing priorities and goals through an Assessment of Fair Housing (AFH). The rule identifies four fair housing issues that program participants will assess:

1. Patterns of integration and segregation;
2. Racially and ethnically concentrated areas of poverty;
3. Disparities in access to opportunity; and
4. Disproportionate housing needs.

The AFH process begins with the provision of data, guidance, and an assessment tool that will help program participants identify fair housing issues and related contributing factors in their jurisdiction and region. Program participants are required to set goals to overcome fair housing issues and related contributing factors. Those goals must inform subsequent housing and community development planning processes.

Part	Description
Part One: Provision of	HUD provides each program participant with data and an AFH assessment tool to

Updates

The Assessment of Fair Housing (AFH) was posted for the 30 day Paperwork Reduction Act (PRA) public comment period on July 16, 2015. Please visit the [federal registrar](#) to find the PRA notice, which includes the AFH. As part of the PRA process HUD is also releasing a beta test version of the AFFH Data and Mapping Tool. [Access the AFFH Data and Mapping Tool.](#)

Resources and Training Material

[AFFH Final Rule](#)

[AFFH Final Rule Executive Summary](#)

[AFFH Fact Sheet](#)

[AFFH FAQs](#)

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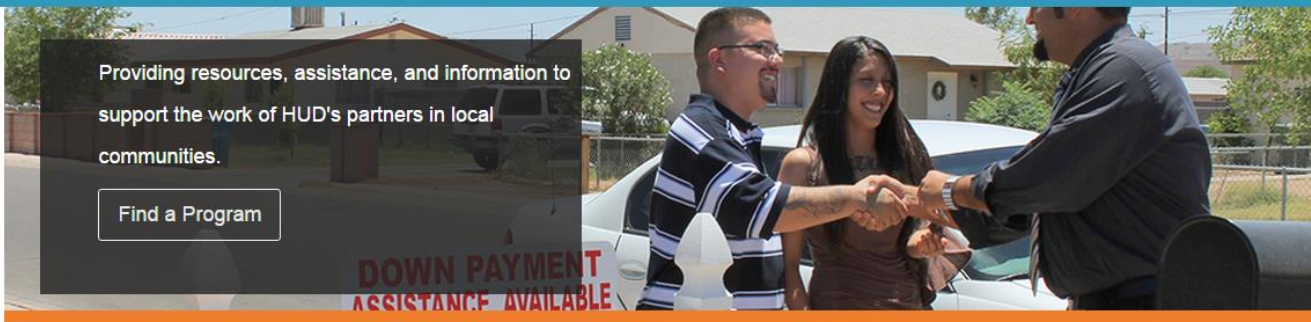
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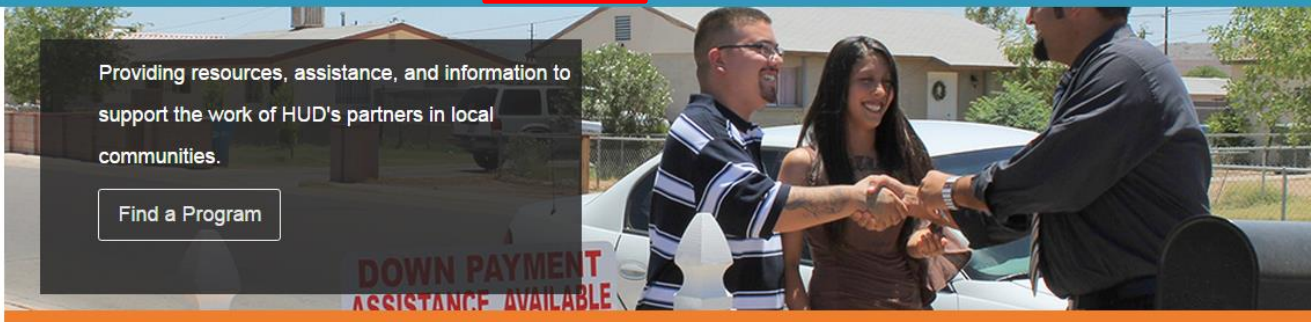
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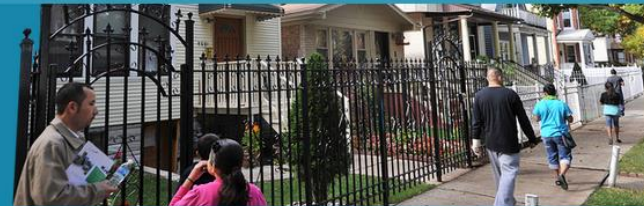
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[Ask A Question](#)

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Based on the information provided, HUD will determine the type and level of assistance available to you.

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- [Find Hurricane Sandy assistance](#)
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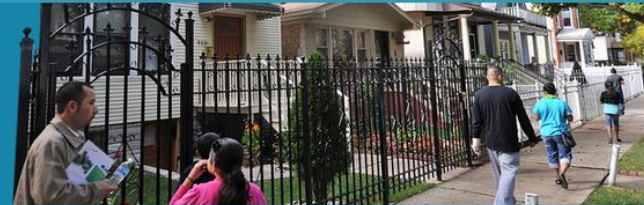
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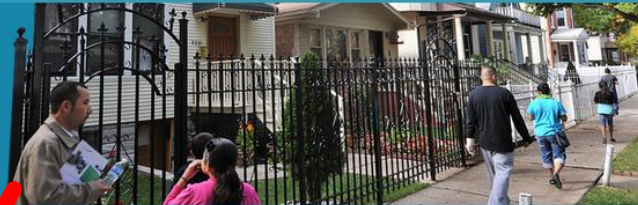
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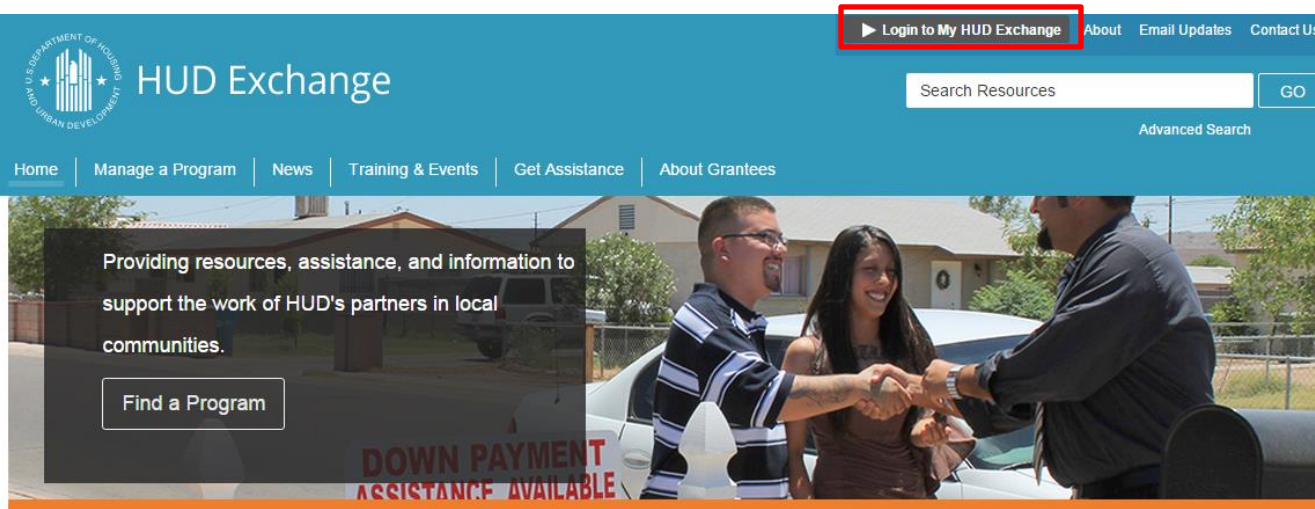
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Lead the Way

[Lead the Way: Public Housing Agency \(PHA\) Governance and Financial Management](#) is a free, online training to help PHA boards and staff fulfill their responsibilities in providing effective governance and oversight.

National Disaster Resilience Competition

The application deadline for invited Phase 2 applicants is October 27, 2015. View resources related to the [National Disaster Resilience Competition](#).

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HUD is implementing grant based accounting in IDIS to phase out the first-in-first-out accounting methodology for the formula grant programs.

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Grantee Tools

[CPD Income Eligibility Calculator](#)

The interactive Income Calculator helps grantees determine income eligibility for beneficiaries of CPD programs. Grantees enter the requested data and the calculator works behind the scenes to generate a summary of results for each beneficiary.

[Ask A Policy or Reporting System Question](#)

HUD grantees that need HUD policy guidance or troubleshooting assistance with reporting systems can submit questions through Ask a Question and receive responses from HUD and PHA grantees.

Housing Assistance

[Find homelessness assistance](#)

[Find veterans assistance](#)

[Buy a home](#)

[Avoid foreclosure](#)

[Find rental assistance](#)

[Find Housing Choice assistance](#)

Tricks & Tips



HUD Exchange

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Join Mailing List

Sign up to receive updates on HUD Exchange program policy, news, upcoming trainings, resources, reporting deadlines, technical assistance and more. This mailing list is a consolidated mailing list for HUD Exchange programs.

1. To subscribe for this mailing list. If you are not yet subscribed to any HUD Exchange program mailing list, click the Subscribe button below, enter the required fields, and select the topic(s) you wish to receive information about.

[Subscribe](#)

2. If you are subscribed to any HUD Exchange program mailing list, you have been automatically subscribed to the HUD Exchange mailing list and you will only receive messages related to the topics you had previously subscribed to in addition to HUD Exchange updates.

- To add/remove topics that you wish to receive information for, click the Subscribe button above, fill in the required fields and click Subscribe to List. You will then be prompted to click on the update profile link. A message will be sent to the email address you registered with. In this email, click Update your Preferences to manage the topics you're subscribed to.
- If you wish to be removed from ALL topic mailing lists, go to the [Unsubscribe](#) page and type in your email address.

HUD also offers a number of other listservs for HUD grantees, their partners, and other interested parties to stay informed. Visit [HUD's Mailing List](#) page to learn more.

Privacy Statement: When you register for a mailing list, we won't share your email address with anyone outside HUD. For more information, read the HUD Exchange [Website and Privacy Policies](#).

Mailing List Archive

September 2015

09/08/2015 - Rural Update: Funding Opportunity Announcements and Request for Comment for the Third Round of the Promise Zones Initiative

09/08/2015 - Reminder: NDRC Topical Webinar: Measuring Success in Resilience: Baselines, Metrics and Data-driven Decisions - September 9, 2015 - 3 PM EDT

09/04/2015 - HUD Publishes New NDRC FAQs - September 3, 2015

09/03/2015 - Upcoming Webcast: VAWA and HOPWA Project Demonstration Webcast - September 8, 2015 - 2:00 PM EDT

09/03/2015 - Register Today: Building HOME: Webinar Series I - September 16, 23, 30, and October 7, 2015 - 1 PM EDT

Browse By

[2015+](#)

[2014+](#)

[2013+](#)

[All](#)

Tricks & Tips



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Browse By


[2015+](#)

[2014+](#)

[2013+](#)

[All](#)

Tricks & Tips

 **HUD Exchange Mailing List**

The HUD Exchange Mailing List provides email updates on resources, trainings, events and announcements for all HUD programs, as well as updates on the functionality of the [HUD Exchange](#).
Click to view the [HUD Exchange Privacy Policy](#).

Please select from the list below the topics for which you would like to receive email updates.

Email Address

State/Territory

Alabama

City

Organization Type

CoC Number and Name

County

I'd like to receive email updates about

- ☐ 811 PRA - 811 Project Rental Assistance
- ☐ ACA - Affordable Care Act
- ☐ ARC - Appalachian Regional Commission
- ☐ Acquisition and Relocation
- ☐ AEDI - Appalachia Economic Development Initiative
- ☐ BEDI - Brownfields Economic Development Initiative
- ☐ BCCI - Border Community Capital Initiative
- ☐ BRAC - Base Realignment and Closure
- ☐ CDBG - Community Development Block Grant
- ☐ CDBG-DR - Community Development Block Grant Disaster Recovery
- ☐ CoC - Continuum of Care Program
- ☐ DRGR - Disaster Recovery Grant Reporting
- ☐ DCCI - Delta Community Capital Initiative
- ☐ EDI - Economic Development Initiative
- ☐ EDI-SP - Economic Development Initiative - Special Projects
- ☐ Emergency Solutions Grants
- ☐ Environmental Review
- ☐ HMIS - Homeless Management Information Systems
- ☐ HOME - HOME Investment Partnerships Program

Tricks & Tips

- To get on the San Francisco CPD listserv, send an email to your CPD Rep.
- We have listservs for both entitlement and competitive (CoC) programs

Tricks & Tips



HUD Exchange

Hi, Alice Walkup

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[Email Updates](#)

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[My HUD Exchange](#)

Providing resources, assistance, and information to support the work of HUD's partners in local communities.

[Find a Program](#)

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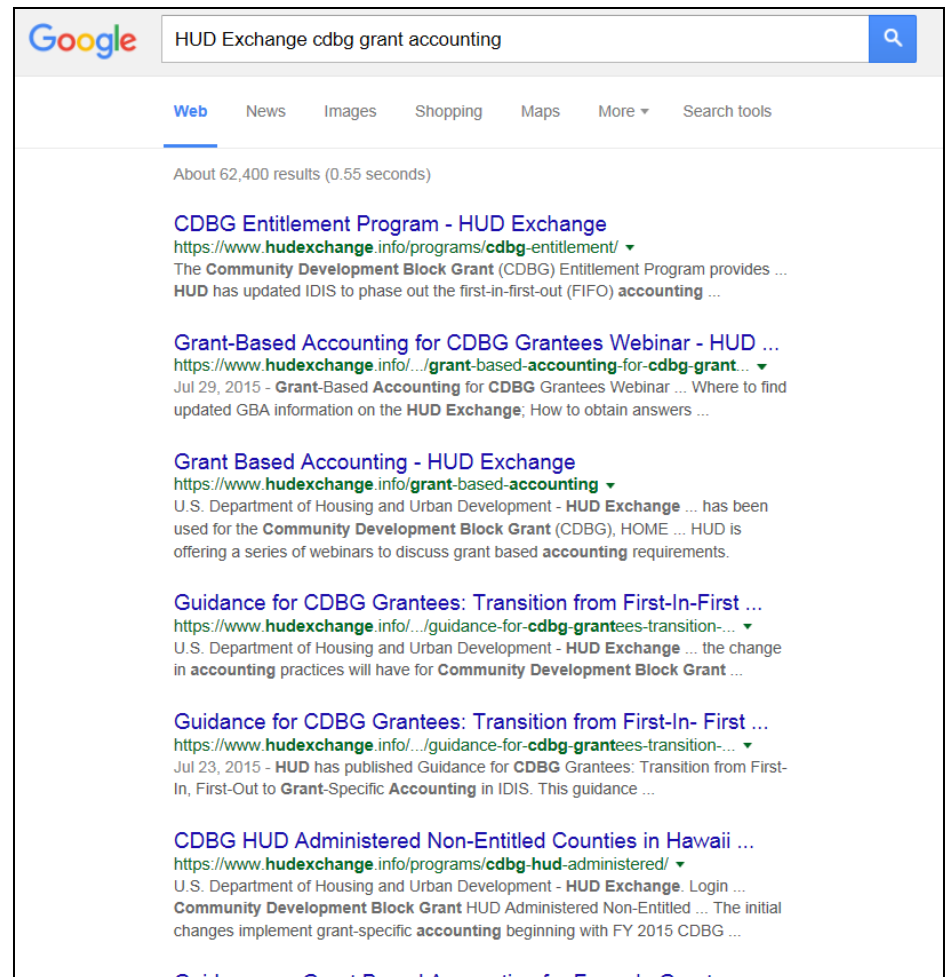
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Housing Assistance

- [Find homelessness assistance](#)
- [Find veterans assistance](#)
- [Buy a home](#)

Tricks & Tips

- Search for the information you are seeking along with the terms “HUD Exchange”
- Bookmark pages you refer to often using your web browser’s feature



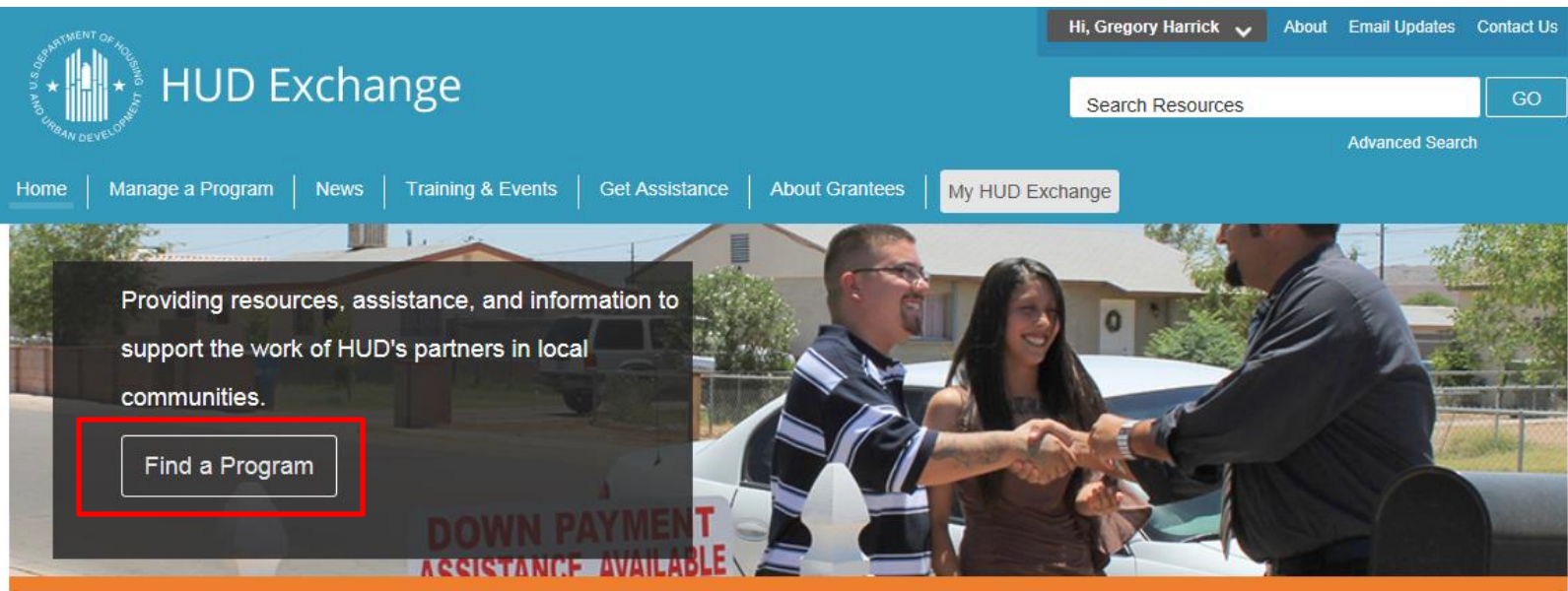
HOME Tips - General

- HUD Exchange is a good source of HOME info
 - Good place for Policy Guidance
 - Clearinghouse of HOME Reports
 - Background on HOME
 - Timely Issues: 2013 Final Rule
 - No AAQ for HOME or CDBG



HOME Tips – 2013 Final Rule

- From Home Page, click “Find a Program”



Lead the Way

[Lead the Way: Public Housing](#)

National Disaster
Resilience

Grant Based
Accounting

Affirmatively
Furthering Fair

HOME Tips – 2013 Final Rule

- Click “Affordable Housing”



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Manage a Program

Find guidance about HUD programs, cross cutting requirements, activities, and program management topics to help implement your program



Affirmatively Furthering Fair Housing

CDBG, HOME, ESG, and HOPWA State and local government and PHA grantees must meet Affirmatively Furthering Fair Housing (AFFH) requirements.



Affordable Housing

HUD's affordable housing programs include: 811 PRA, HOME, HOPWA, HTF, and NSP, as well as Multifamily Preservation Programs such as RAD and Section 236 Preservation. Multifamily Energy Efficiency Initiatives include the Better Buildings Challenge.



Energy

HUD's energy initiatives include the Better Buildings Challenge and Advancing Renewable Energy in Affordable Housing.



Community Development

HUD's community development programs include: ARC, BEDI, CDBG-DR, CDBG Colonias, CDBG



Consolidated Planning

The consolidated planning process serves as a framework for community-wide dialogue to identify

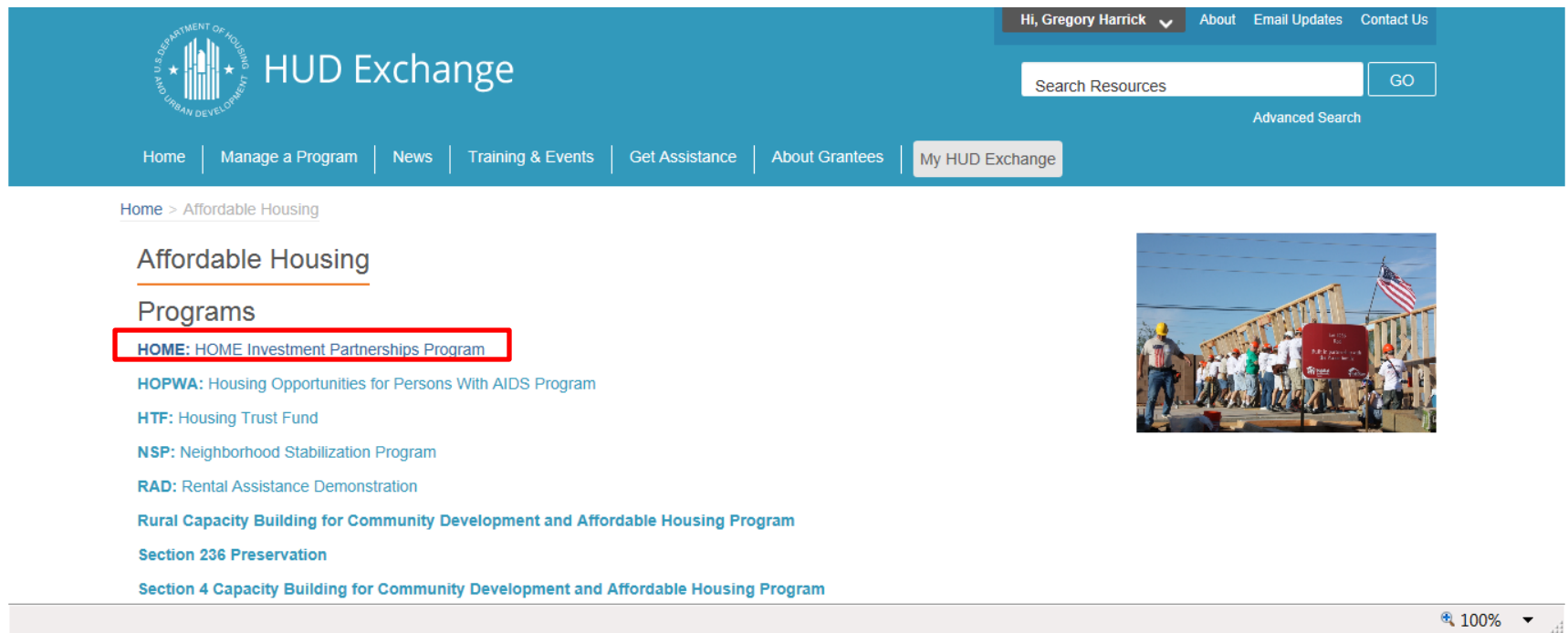


Economic Development

HUD's economic development programs include: AFDL, BCCI, BEDI, CDBG-DR, Community Renewal

HOME Tips – 2013 Final Rule

- Click “HOME Investment Partnership Program”



The screenshot shows the HUD Exchange website interface. At the top, there is a blue header with the HUD logo and the text "HUD Exchange". To the right of the header, there is a user profile dropdown menu showing "Hi, Gregory Harrick" and links for "About", "Email Updates", and "Contact Us". Below the header, there is a search bar labeled "Search Resources" with a "GO" button and a link to "Advanced Search". A navigation bar below the search bar contains links for "Home", "Manage a Program", "News", "Training & Events", "Get Assistance", "About Grantees", and "My HUD Exchange". The main content area shows a breadcrumb trail "Home > Affordable Housing" followed by the heading "Affordable Housing Programs". Under this heading, a list of programs is displayed, with "HOME: HOME Investment Partnerships Program" highlighted by a red rectangular box. Other programs listed include "HOPWA: Housing Opportunities for Persons With AIDS Program", "HTF: Housing Trust Fund", "NSP: Neighborhood Stabilization Program", "RAD: Rental Assistance Demonstration", "Rural Capacity Building for Community Development and Affordable Housing Program", "Section 236 Preservation", and "Section 4 Capacity Building for Community Development and Affordable Housing Program". To the right of the text, there is a photograph of construction workers on a building site with an American flag.

Hi, Gregory Harrick ▾ About Email Updates Contact Us

HUD Exchange

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Advanced Search

Home | Manage a Program | News | Training & Events | Get Assistance | About Grantees | My HUD Exchange

Home > Affordable Housing

Affordable Housing
Programs

HOME: HOME Investment Partnerships Program

HOPWA: Housing Opportunities for Persons With AIDS Program

HTF: Housing Trust Fund

NSP: Neighborhood Stabilization Program

RAD: Rental Assistance Demonstration

Rural Capacity Building for Community Development and Affordable Housing Program

Section 236 Preservation

Section 4 Capacity Building for Community Development and Affordable Housing Program

100% ▾

HOME Tips – 2013 Final Rule

- Below “2013 HOME Final Rule,” click on “Learn about changes in the 2013 HOME Final Rule”

Learn about grant based accounting requirements.

2013 HOME Final Rule

HUD published a [Final Rule in the Federal Register \(Changes Only\)](#) on July 24, 2013 to amend the HOME Investment Partnerships (HOME) Program regulations. These amendments to the HOME regulations represent the most significant changes to the HOME Program in 17 years.

[Learn About Changes in the 2013 HOME Final Rule](#)

[View HOME Webcasts](#)

HOME Topics

Documents and publications are provided by topic to assist PJs and program partners in designing and implementing their programs. Users can also find HOME Program resources using the [Advanced Search](#).

[View HOME Topics](#)

HOME News & Announcements

[HOME Monthly Reports as of 8/31/2015 and 9/1/2015 Now Posted](#)
Date Posted: September 04, 2015

[Grant Based Accounting Webinar Series](#)
Date Posted: August 31, 2015

[HUD Publishes New and Revised FAQs for the HOME Program and National Housing Trust Fund Program](#)
Date Posted: August 14, 2015

[HOME CPD Notices](#)

[HOME Policy Memos](#)

[HOME FACTS](#)

[HOMEfires](#)

[HOME FAQs](#)

Reporting Systems

[IDIS: Integrated Disbursement and Information System](#)

- [IDIS Sign-In](#)

[eCon Planning Suite \(Consolidated Plan\)](#)

HOME Reports

[2012/2013 HOME Activities Reports](#)

[2012/2013 HOME Homebuyer](#)

Reporting

- Scroll to bottom of page.
- Under Manage a Program
- Click Systems
 - <https://www.hudexchange.info/systems>

Manage a Program

Affordable Housing
Community Development
Consolidated Planning
Economic Development
Environmental Review
Financial Management
Homelessness Assistance
Rural

Systems

News

News Feed
Email Updates

Training & Events

All Training
Training Calendar

Get Assistance

Ask a Policy Question
Contact Us
Request In-depth Advice

About Grantees

Search for Organizations
Allocations and Awards

Website Information

About Us
Accessibility
Browser Compatibility
Privacy Policies

Toggle High Contrast: ☐ Off



[Home](#) > [Systems](#)

Systems



DRGR: Disaster Recovery Grant Reporting System | [Log-in](#)

eCon Planning Suite | [Log-in](#)

e-snaps: Homeless Assistance Application and Grants Management System | [Log-in](#)

FSRS: Federal Funding Accountability and Transparency Act (FFATA) Subaward Reporting System | [Log-in](#)

HDX: Homelessness Data Exchange | [Log-in](#)

HMIS: Homeless Management Information System

HEROS: HUD Environmental Review Online System | [Log-in](#)

IDIS: Integrated Disbursement and Information System | [Log-in](#)

Integrated Disbursement and Information System

As a nationwide database, the Integrated Disbursement and Information System (IDIS) provides HUD with current information regarding the program activities underway across the Nation, including funding data. HUD uses this information to report to Congress and to monitor grantees. IDIS is the draw down and reporting system for the four CPD formula grant programs: [Community Development Block Grant \(CDBG\)](#), [HOME Investment Partnerships \(HOME\)](#), [Emergency Solutions Grants \(ESG\)](#), and [Housing Opportunities for Persons With AIDS \(HOPWA\)](#); and for the CPD competitive grant program [HOPWA Competitive](#). Grantees also use IDIS for [Consolidated Planning](#).

- [Learn about IDIS Reporting](#)
- [Learn about the Electronic Data Interchange \(EDI\) Alternative for Grantees that Transmit Large Amounts of Data to IDIS](#)

IDIS Account Creation and Maintenance

Instructions for obtaining an IDIS account, maintaining a separation of duties, and the user acceptance testing server are provided to assist grantees in using IDIS.

[View IDIS Account Creation and Maintenance](#)



IDIS Guides, Tools, and Webinars

Guides, tools, webinars, and other resources are provided to assist grantee in using IDIS. View IDIS resource for the following programs: CDBG, HOME, Emergency Solutions Grant (ESG), and HOPWA.

[View IDIS Guides, Tools, and Webinars](#)



Grant Based Accounting

HUD has updated IDIS to phase out the first-in-first-out (FIFO) accounting methodology. These changes to IDIS ensure that funds are both committed and disbursed in IDIS on a grant-specific basis, instead of using the FIFO

[Join a Mailing List](#)

[View IDIS FAQs](#)

[Ask an IDIS Question](#)

Log-in or Registration

[IDIS Log-in](#)

[IDIS Account Creation and Maintenance](#)

[Training and Testing on the User Acceptance Testing \(UAT\) Test Servers](#)

Hours of Operation and Contact

Hours: IDIS is available Monday to Saturday from 7:00 a.m.- 10:00 p.m. ET and on all federal holidays.

IDIS Guides, Tools, and Webinars

Guides, tools, webinars, and other resources are provided to assist grantees in using the Integrated Disbursement and Information System (IDIS).

Find By Topic

Consolidated Plan

CDBG: Community
Development Block
Grant Program

ESG: Emergency
Solutions Grants
Program

HOME: HOME
Investment
Partnerships
Program

HOPWA: Housing
Opportunities for
Persons With AIDS
Program

IDIS Reference Materials for CDBG Grantees

- [Guidance for Reporting CDBG Accomplishments and Performance Measures in IDIS](#)

Manuals

(provide detailed instructions for using IDIS)

- [IDIS Online for CDBG Entitlement Communities \(Manual and Appendices\)](#)
- [IDIS Online for State CDBG Grantees \(Manual and Appendices\)](#)

Additional Guidance

(some of which are also available in the appendices to the above manuals)

- [FAQs CDBG IDIS 11.4 System Changes](#)
- [Zeroing Out Draws and Defunding Activities in IDIS](#)
- [Instructions for Returning Funds to the Line of Credit and to US Treasury](#)
- [Matrix Code Definitions](#)
- [National Objective Code Descriptions](#)
- [Matrix Code/National Objective Table](#)
- [Matrix Code/National Objective/Accomplishment Type Combinations Table](#)
- [EDA Job Category Definitions](#)
- [Reporting Race/Ethnicity Data for Activities Providing Access for Persons with Disabilities](#)
- [Instructions for Completing the CDBG Financial Summary Report \(PR26 \)](#)
- [Energy Star Performance Standards for Buildings](#)
- [IDIS Reports Guide](#)
- [Definitions of Strategy, Local Target, and CDFI Areas](#)
- [Selecting and Adding Special Areas on CDBG Setup Detail](#)
- [CDBG Changes in IDIS Instructions for Grantees IDIS Release 11.4: At-Risk Activity Review, Cancelling Activities with Draws, & Re](#)

IDIS Quick Tips

- New IDIS Form launched in September.
- IDIS Online password expires after 90 days
- Practice logging in once a month
- Lapsed ID, send in a new IDIS request
- Password reset call 888-297-8689 (3)
- Need a local IDIS Administrator. IDIS will require the local Administrator to verify Grantee Chief Elected Official and Grantee Program contacts information for the first time after the 11.11 release and every 6 months thereafter.

Local IDIS Administrator can perform certain functions.

law. Failure to provide the information requested on the form may delay the processing of your approval for access to IDIS.

GRANTEE & REQUESTOR INFORMATION

REQUEST TYPE	Role to be Performed by Headquarters	Role to be Performed by Field or Local IDIS Administrator
	New Request <input type="checkbox"/>	Drop from IDIS <input type="checkbox"/>
	Renew Lapsed ID <input type="checkbox"/>	Change Function or Program Area <input type="checkbox"/>
	Change Name <input type="checkbox"/>	
	Add Access for Another Grantee <input type="checkbox"/>	
Last 5 Digits of the Social Security Number (SSN): <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Requestor's Name (Last, First, MI): <input type="text"/>		
E-mail Address: <input type="text"/>		
Office Address: <input type="text"/>		Office Phone: <input type="text"/> ext.: <input type="text"/>
Grantee Name in IDIS: <input type="text"/>		GRANTEE TYPE
		City <input type="text"/> County <input type="text"/> State <input type="text"/> Non-Profit <input type="checkbox"/> Sub Grantee* <input type="checkbox"/>
Please Mark All Necessary Functions & Programs		
Authorized Functions	Set Up Activity <input type="checkbox"/>	Request Drawdown <input type="checkbox"/>
	Approve Drawdown <input type="checkbox"/>	Local IDIS Administrator <input type="checkbox"/>
Program Areas	CDBG <input type="checkbox"/> HOME <input type="checkbox"/> ESG <input type="checkbox"/> HOPWA <input type="checkbox"/>	Other <input type="text"/>
	HESG <input type="checkbox"/> HOPWA-C <input type="checkbox"/>	
If other, please specify name of program		

Technical Assistance

- On HUD Exchange Home Page, click Get Assistance to access the Ask A Question (AAQ)
- Applies to eSNAPS, DRGR, IDIS, eCon Planning Suite



HUD Exchange

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Search Reso

Home

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Home > Systems

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HEROS: HUD Environmental Review Online System | [Log-in](#)

IDIS: Integrated Disbursement and Information System | [Log-in](#)

Get Assistance

HUD offers different types of assistance through the Community Compass Technical Assistance program, including: answers to policy, program, and system questions; in-depth advice on technical issues; and housing assistance resources. Submit your request for assistance via HUD Exchange.



Do you have a policy question or need assistance with a reporting system?

HUD grantees that need HUD policy guidance or troubleshooting assistance with reporting systems can ask their questions here.

HUD and TA Providers provide answers to basic policy questions, assist grantees with system troubleshooting, and direct grantees to the most relevant online resources, such as trainings and guidebooks.

Questions are generally answered within two business days. However, some questions must

Do you need in-depth advice on implementing a program?

Grantees that need in-depth advice and assistance with implementing, operating, or administering a HUD-funded program can ask for help here.

Based on the information provided, HUD will determine the type and level of assistance available to you.

This type of assistance is more involved than basic policy or reporting system questions. It involves recurrent communication with TA providers, possible site visits, and/or longer-term assistance that enables your organization to build skills, knowledge,

Technical Assistance Cont.

- FAQs
 - <https://www.hudexchange.info/e-snaps/faqs>
 - <https://www.hudexchange.info/drgr/faqs/>
 - <https://www.hudexchange.info/resource/3177/economic-planning-suite-faqs/>
- FSRS
 - Not a HUD System
 - https://www.fsrs.gov/help_desk

FAQ Keyword Search:

Topics:

▼ APR

Reporting Requirements ▼

► CoC Registration

Reset

Topic/Subtopics: **APR > Reporting Requirements**

How is cash match calculated on the CoC APR for SHP, S+C, and CoC Programs?

Date Published: December 2014

For SHP and S+C Programs, the cash match is calculated as a percentage of your "Total Expenditures." For example: If you enter \$100 in SHP funds for your Services total in 30a2, and then enter \$100 as your cash match expended, your cash match percentage will be 50%. e-snaps automatically calculates match percentages. If your ...

We are in the last year of a 5 year grant. We have calculated our match and we meet the match for the 5-year period, but we spent less this year than in the past four years, and so it looks like we have not met the match this year. How should we report on match this year?

Date Published: August 2011

For former Shelter Plus Care grants, on form Q31 (Expenditures and Value of Services), grantees are asked if they are completing the initial term of the grant. If so, they can indicate the total match for the grant. This gives grantees an opportunity to show that they have met their match obligation for the grant. However, the chart containing the ...

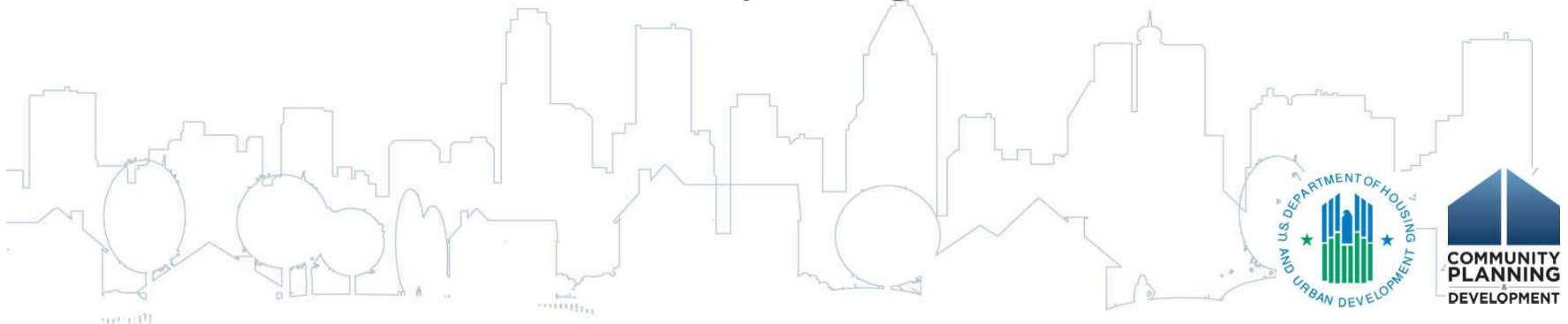
I am trying to complete an APR for two grants that have consolidated. How do I know which grant number and name to use in e-snaps, and what are my reporting requirements?

Date Published: August 2011

Homeless Presentation

Hataitip Bufiy-Feng

Kimberly Ferguson



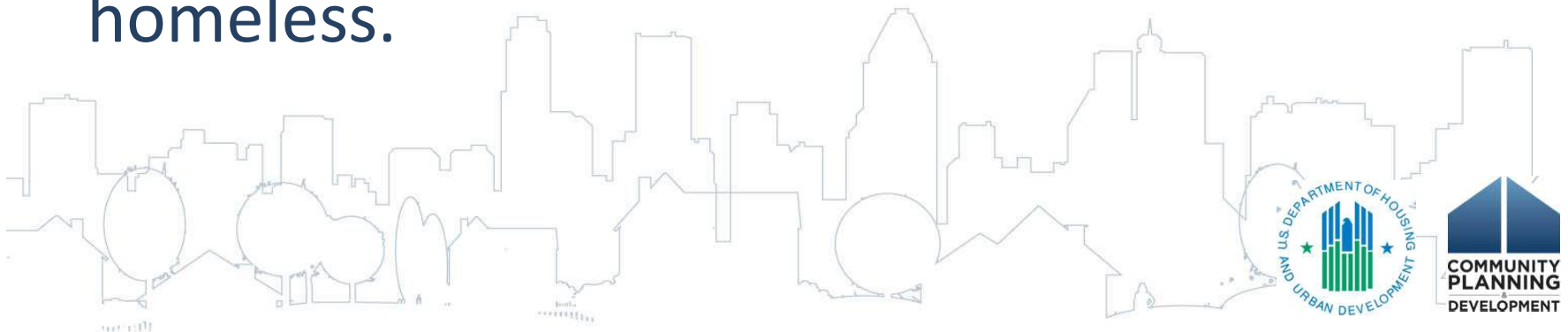
Overview

- Functional Zero
- Coordinated Assessment
- Things to keep in mind



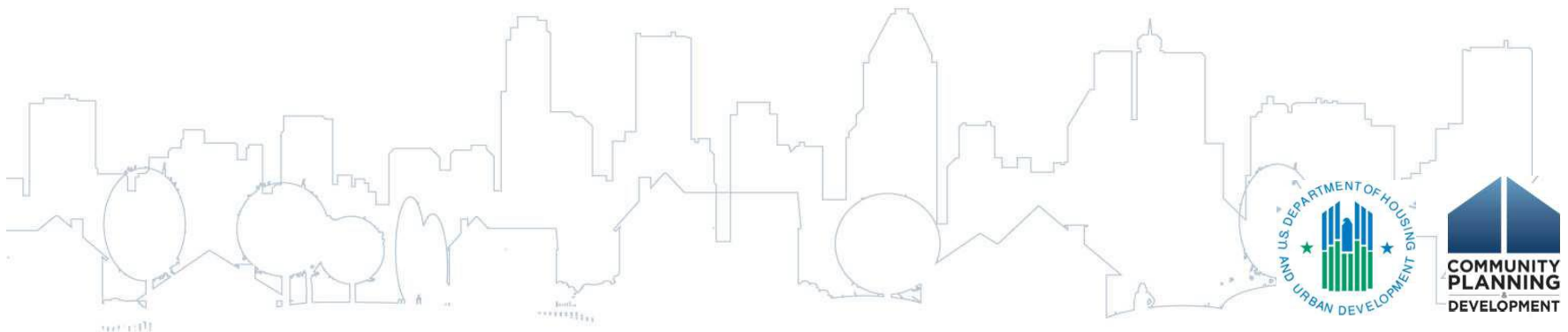
Functional Zero

- Reached when the availability of resources exceeds the size of population needing the resources.
- Having the service delivery systems and resources that can rapidly housed the homeless.



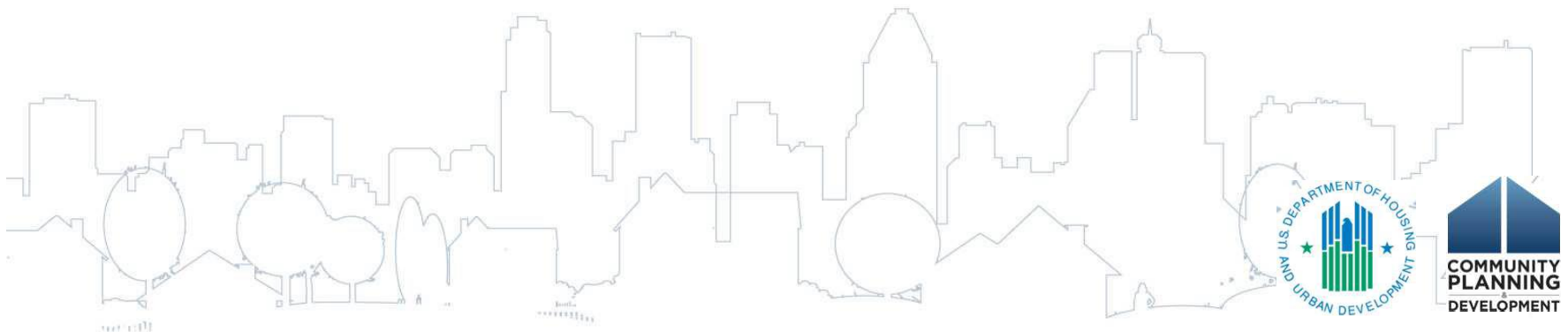
Background

- The 100,000 Homes Campaign
- Housing First Program
- Functional Zero
- Communities reached Zero: Phoenix, New Orleans, Salt Lake City, Houston



Phoenix Method

- Project H3: Home, Health, and Hope.
- Key Partners: Arizona Coalition to End Homelessness; Arizona Department of Veterans Affairs; Phoenix Housing Department; and Phoenix VAMC, etc.



When we talk about Coordinated Assessment, what do we mean?

- It is a unified system for delivering services to those at-risk and those experiencing homelessness operating within the boundaries of the CoC
- An assessment protocol which is applied consistently by all providers working within the system of care
- An assessment tool which links clients with the services most appropriate to their needs and to providers best able to provide those services

The purpose of a Coordinated Assessment System is to:
“Facilitate coordination of services and foster efficient use of resources”
(from the 12/5/11 preamble to the HEARTH-ESG & Consolidated Plan conforming amendments)

Some Qualities of an Effective Coordinated Entry System

For the clients

- Prioritization
- Low barrier
- Person-centered
- Inclusive
- Housing First oriented

For the System

- Full coverage
- Standardized access and assessment
- Referral to projects
- Leverage local attributes and capacity
- On-going planning

Things to keep in mind

Prioritizing the most vulnerable/those with most severe needs:

- Communities should decide the factors that are most important in establishing priorities

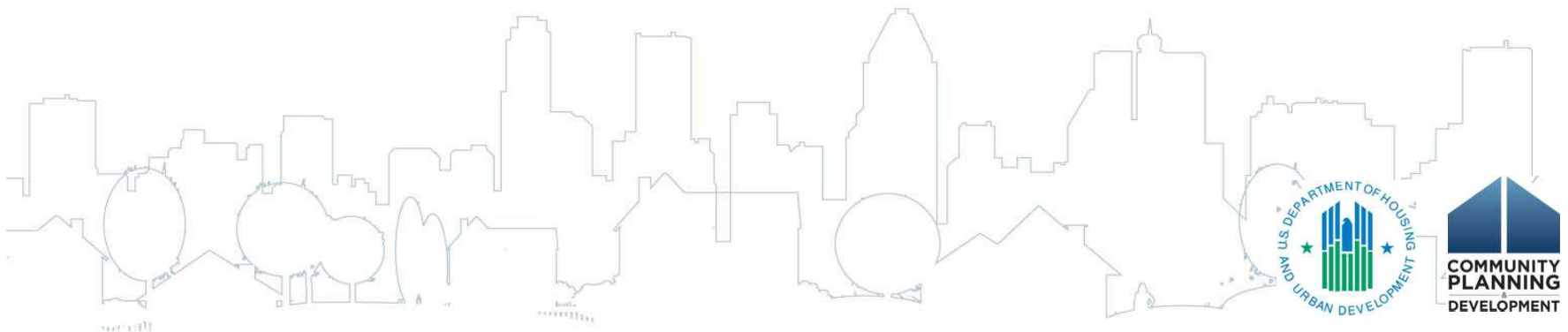
Addressing waiting times for housing:

- Pursue close ties with PHAs and affordable housing providers
- Develop “move-up” strategies for formerly homeless who no longer need PSH units

Coordinated Assessment Systems

Highlighting two Region 9 CoCs

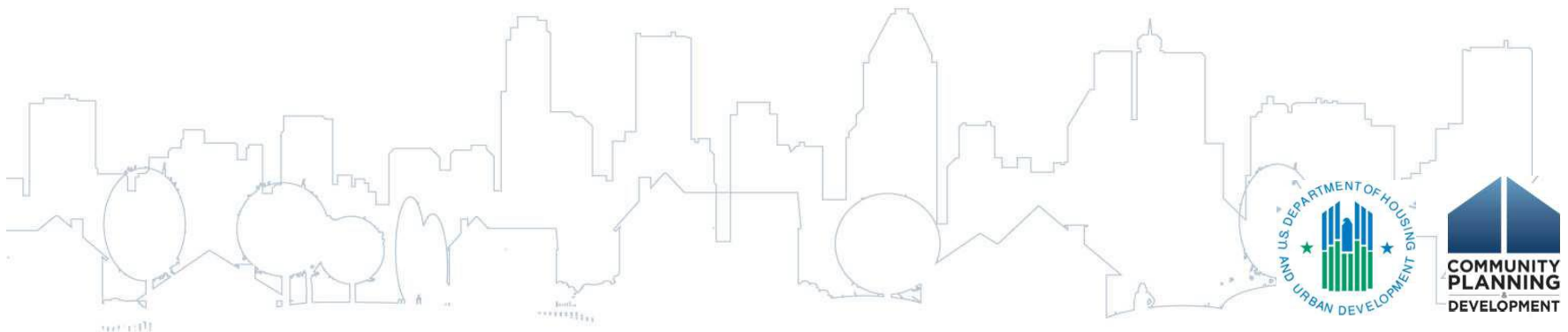
- Maricopa County, AZ – “Ending Family Homelessness by 2020”
- Santa Clara County, CA “Community Plan to End Homelessness”



Maricopa County CoC

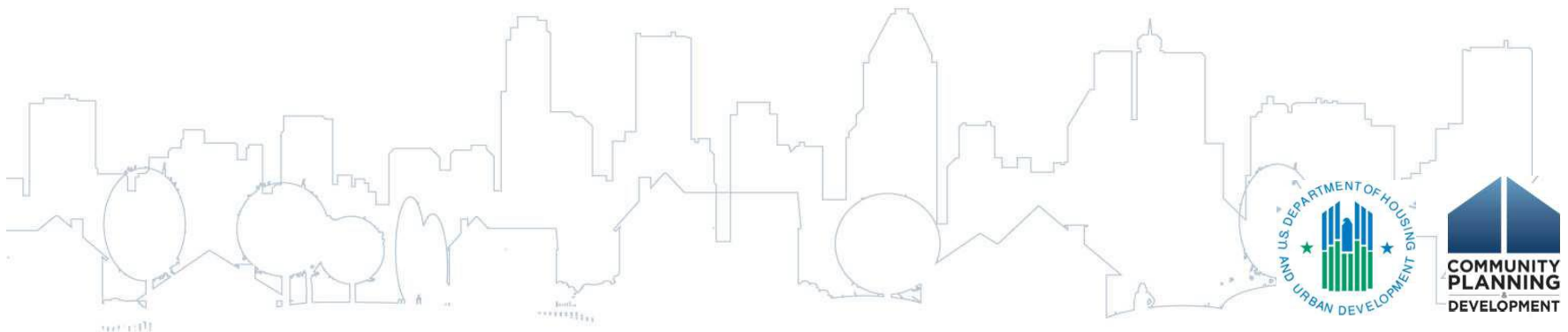
Ending family homelessness requires a system of supports which:

- prevents *and* diverts families from homelessness; and
- responds rapidly for those families that can not be diverted/prevented from becoming homeless.



For families in shelter, the coordinated system must:

- Recognize that each family in shelter has unique needs and that their housing must fit those particular needs.
- Ensure emotional and physical safety of families.

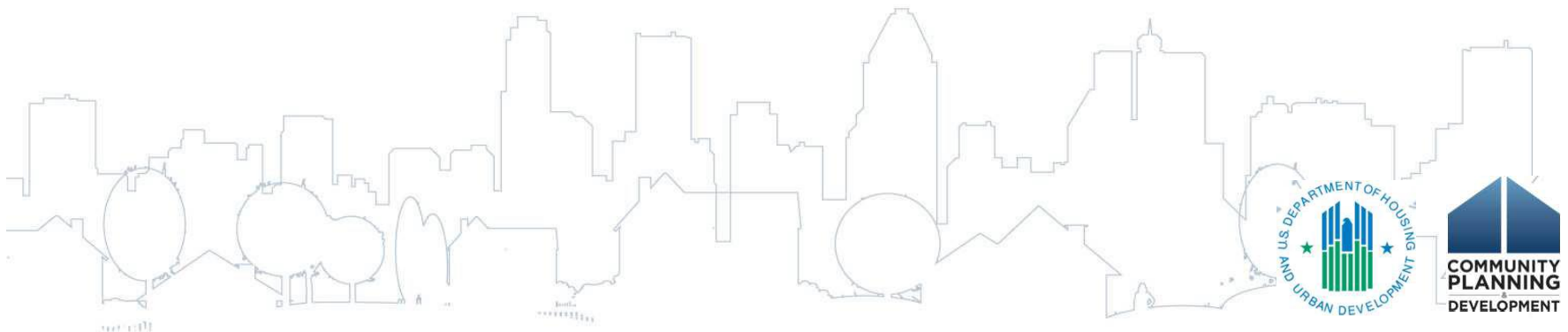


Principles to Guide the Maricopa CoC to the goal of ending homelessness

- Strategic use of resources that puts the needs of families first
- System responsiveness to current needs and capacity of providers
- Make diversion part of coordinated entry
- Rely on data for decisions
- Common pot of funds for certain core activities

Santa Clara County CoC

Striving for a community in which all residents have access to appropriate and affordable housing and the support they need to retain it.



Principles to Guide the Santa Clara County CoC to end homelessness:

- Disrupt current systems
- Build the solution – housing and services
- Client centered services
- Make services and housing available throughout the County
- Recognize the unique needs and challenges

CoCs and Entitlements working together to end homelessness

Did you know....

The Consolidated Plan regulations which Entitlement Grantees must follow to receive CDBG/HOME/ESG and HOPWA funds align with the CoC regulations to support more effective consultation; coordination of policy and funding, creation of metrics and assessment of performance.

The interim rule refocuses the general homelessness-related strategies on the ultimate goals of reducing and ending homelessness and aligns them with Continuum of Care planning strategies and performance measures. These strategies include:

- shortening the period of time that persons experience homelessness;
- helping persons who were recently homeless avoid becoming homeless again.

For Entitlements, these strategies and metrics should be described in the Consolidated Plans/Action Plans and performance results presented in the Consolidated Annual Performance and Evaluation Report.

Strategies and Planning

Homeless Strategy

All Entitlement Grantees must describe the jurisdiction's homeless strategy, and resources available (should extend beyond HUD funds) to address the needs of the homeless and persons at risk of homelessness. (*please refer to the Consolidated Plan regulations – 91.100(a)(2)*)

Action Plan

All grantees must describe outreach services to the homeless; how the emergency shelter and transitional housing needs will be addressed, and how it will be aid in the transition of the homeless from transitional to permanent housing – including:

- Shortening period of time in homelessness
- Preventing reentry to homelessness
- Homelessness prevention

ESG Funds and Consultation

Consult with the:

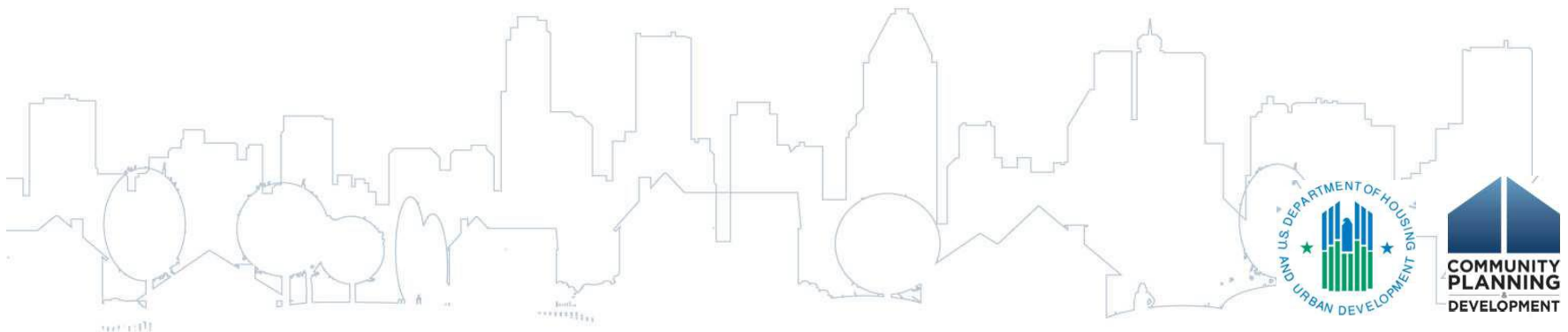
- CoC
- Homeless service providers
- Institutions that discharge people to homelessness
- Business and Civic Leaders

Consult on:

- Allocation of ESG funds
- Developing performance measurement standards
- Evaluation of funded programs
- Develop policies and procedures for operation and administration of HMIS

ESG Grantees must also

- Describe the CoC coordinated assessment system
- Describe the process for making ESG funding awards
- Consult with the homeless or formerly homeless on policies and funding decisions



Evaluation and Reporting

All Entitlement Grantees must evaluate the jurisdiction's progress in meeting specific objectives for reducing and ending homelessness through:

- Outreach and assessment
- Emergency and transitional shelter
- Transitions to permanent housing through shortening episodes of homelessness; access to affordable housing and preventing recurrence of homelessness
- Homeless prevention

ESG recipients must also report:

- The number of persons assisted
- The types of assistance
- Outcome data measured using the standards developed with the CoC

PHAs helping CoCs to end homelessness

Focus on Admission/Termination Policies and the formerly incarcerated:

- Amend discretionary admission/termination policies on:
 1. criminal activity
 2. lease-violations related to domestic violence
 3. look-back periods
 4. consideration of additional information
- Develop strong partnerships with homeless services providers/CoC to offer wrap around services to support continued occupancy.

On June 10, 2013 HUD PIH issued Notice 2013-15

“Guidance on housing individuals and families experiencing homelessness through Public Housing and Choice Voucher Programs”

The purpose of this guidance was to identify strategies that PHAs can pursue to expand housing opportunities to the homeless.

Resources

HEARTH - CoC Interim Final Rule 7/31/12

<https://www.hudexchange.info/resources/documents/CoCProgramInterimRule.pdf>

HEARTH- ESG Interim Rule 12/5/11

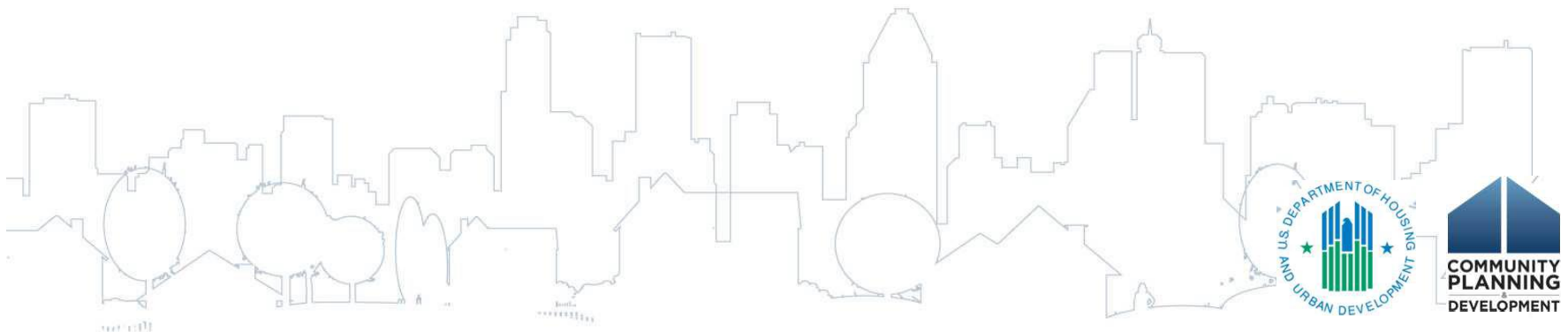
https://www.hudexchange.info/resources/documents/HEARTH_ESGInterimRule&ConPlanConformingAmendments.pdf

PIH 2013-15

<http://portal.hud.gov/hudportal/documents/huddoc?id=pih2013-15.pdf>

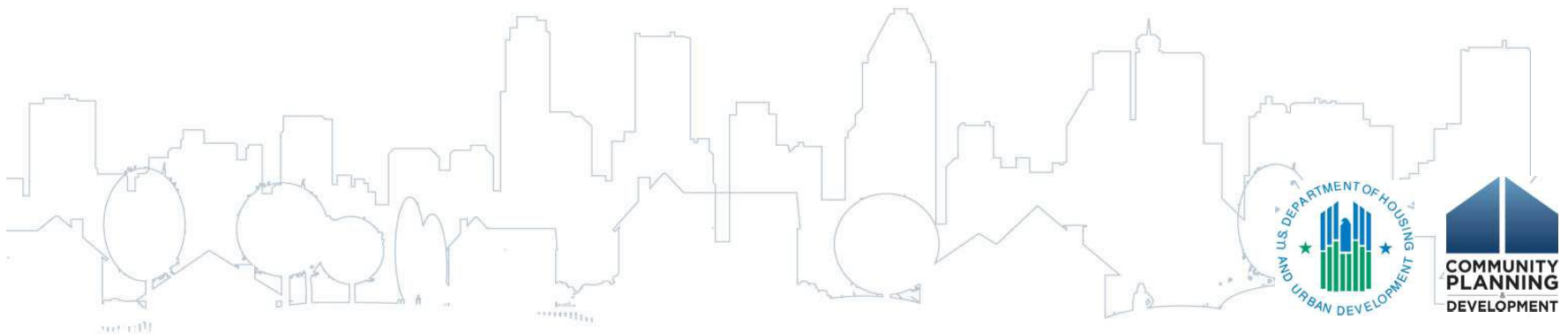
Coordinated Entry Policy Brief

<https://www.hudexchange.info/resources/documents/Coordinated-Entry-Policy-Brief.pdf>



Environmental Review Basics

Kathleen McNulty



The left side of the slide features several vertical stripes in shades of green and grey. Overlaid on these stripes are several circles of varying sizes, all in a bright lime green color. One large circle is positioned near the top left, with several smaller circles of different sizes scattered below and to its right.

ENVIRONMENTAL REVIEW BASICS

General Requirements
October 2015

A single, solid lime green circle is located in the bottom right corner of the slide.

Why must we complete an Environmental Review?

- Improve quality of life
- National Environmental Policy Act
 - Passed by Congress in 1969
 - a.k.a. NEPA





“Pollution”

Norman
Rockwell
1960



HUD's Environmental Regulations

- 24 CFR 58 – Local governments/ states assume responsibility for complying with NEPA, 24 CFR 58.2(a)(7)
- ER must be signed by the Chief Executive Officer of the jurisdiction, 24 CFR 58.2(a)(2)



HUD's Environmental Regulations

- Nonprofit is HUD grant recipient
- Local government (UGLG) is the Responsible Entity (RE)
- Non-profit should contact local government to discuss

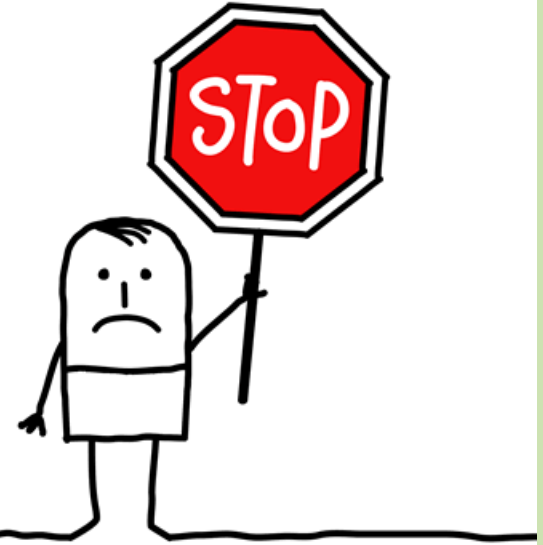
24 CFR 58.2(7)



Timing of ER completion?

BEFORE

- Any funds are committed
- Contracts / leases are signed
- Engaging in project activities
- 24 CFR 58.22





Environmental Review

Welcome to the official website for the Department of Housing and Urban Development's (HUD's) Office of Environment and Energy. The Office of Environment and Energy (OEE) manages the environmental review process for HUD.

An environmental review is the process of reviewing a project and its potential environmental impacts to determine whether it meets federal, state, and local environmental standards. The environmental review process is required for all HUD-assisted projects to ensure that the proposed project does not negatively impact the surrounding environment and that the property site itself will not have an adverse environmental or health effect on end users. Not every project is subject to a full environmental review (i.e., every project's environmental impact must be examined, but the extent of this examination varies), but every project must be in compliance with the [National Environmental Policy Act \(NEPA\)](#), and other related Federal and state environmental laws.

Orientation to Environmental Reviews

Explore the components of an environmental review. The section contains information pertaining to both Part 50 and Part 58 reviews.

[Learn about the Environmental Review Process](#)

Related Federal Environmental Laws and Authorities

Learn about the environmental requirements covered by related federal laws and authorities and referenced in HUD's regulations at 24 CFR 50.4, 58.5, and 58.6. Each environmental topic features a compilation of resources such as trainings, guidance, and useful websites. This section contains all of the content from the Assessment Tools for Environmental Compliance (ATEC).

[View Resources](#)

Environmental Review News & Announcements

[Upcoming: Region 5 Part 58 Environmental Training](#)
Date Posted: May 13, 2015

[Region IV Part 58 Environmental Training - June 30-July 1, 2015 - Atlanta, GA](#)
Date Posted: May 08, 2015

[Environmental Review Process \(24 CFR Part 58\) Training - June 1-3, 2015 - Detroit, MI](#)
Date Posted: May 06, 2015

[Water Wednesdays Webinar Series](#)
Date Posted: April 21, 2015

[Upcoming: HUD Region IX Environmental Review Training \(24 CFR Part 58\)](#)
Date Posted: March 25, 2015

[Upcoming: Q & A Session: Using HEROS](#)
Date Posted: January 30, 2015

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[Ask an Environmental Review Question](#)

[Contact HUD Environmental Staff](#)

Environmental Review Records

[Environmental Impact Statements](#)

[HEROS Environmental Review Records](#)

Featured Topics

[HUD Environmental Regulations](#)

[Environmental Assessments](#)

[Disaster Recovery and Environment](#)

[Environmental Review Training Webinars](#)

[HUD Environmental Review Online System \(HEROS\)](#)

Suggested Formats and Sample Notices

[CoC Limited Scope Review](#)

[Exempt or Categorically Excluded,](#)



<https://www.hudexchange.info/environmental-review/orientation-to-environmental-reviews/>

Orientation to Environmental Reviews

Part 50 and Part 58

Timing the Review

Project Description

Level of Review

Environmental Analysis (Part 58)

Environmental Analysis (Part 50)

Finalizing the Review

Revisiting the Review

Overview

An environmental review is the process of reviewing a project and its potential environmental impacts to determine whether it complies with the National Environmental Policy Act (NEPA) and related laws and authorities. All HUD-assisted projects are required to undergo an environmental review to evaluate environmental impacts. The analysis includes both how the project can affect the environment and how the environment can affect the project, site, and end users.

An environmental review must be performed before any funds, regardless of source, are committed to a project.

Documentation of the environmental review should be maintained in the environmental review record. This record contains the description of all activities that are part of the project and an evaluation of the effects of the project on the human environment and vice versa. This record should be made available for public review.



HUD Exchange

Related Laws and Authorities

Listed in 24 CFR 58.5 & 58.6

Coastal Zone Management



Endangered Species



Environmental Justice



Explosive and Flammable
Facilities



Farmlands Protection



Flood Insurance



Floodplain Management

Historic Preservation

Noise Abatement and Control

Environmental Review Records

Environmental Impact Statements

HEROS Environmental Review Records

Featured Topics

HUD Environmental Regulations

Environmental Assessments

Disaster Recovery and Environment

Environmental Review Training Webinars

HUD Environmental Review Online System (HEROS)

Suggested Formats and Sample Notices

CoC Limited Scope Review

Sample NOI-RROF

Sample Combined Notice (FONSI/RROF)

Form 7015.15 - Request for Release of Funds and Certification (RROF)

Form 7015.16 - Authority to Use Grant Funds (AUGF)

Environmental Assessment

Categorically Excluded, Subject to 58.5

Exempt or Categorically Excluded, Not Subject to 58.5



<http://portal.hud.gov/hudportal/HUD?src=/states/california/working/cpd/cae>

[HUD](#) > [State Information](#) > [California](#) > [Local Program Information](#) > [CPD](#) > [Environmental](#)

Environmental Review

 [Print Friendly Version](#)

Serving Region IX: Arizona, California, Hawaii and Nevada

Region IX Recommended and Required Part 58 Environmental Review Formats

What form to use for a particular project?

[Additional Information on the Appropriate Use for Each of the Formats](#)

Resources for Environmental Review

- ▶ [HUD Exchange Environmental Review](#) - Formats, Webinars, laws and authorities, resources and news
- ▶ [Federal Related Laws and Authorities](#) - Information on the steps for compliance with the Federal laws and authorities listed on the environmental review formats.
- ▶ [Environmental Assessment Factors Guidance](#) - Information on how to comply with the Environmental Checklist factors.

Sign Up for a Mailing List

- ▶ [Northern California Environmental Assistance](#)

Exempt Activities - Listed at 24 CFR 58.34



Counseling



Purchase
Tools
Inspections



- Complete the CENST format
- Comply with 58.6
- Undertake project activities



Categorically Excluded Not Subject to 58.5 Listed at 24 CFR 58.35(b)

- Supportive services: health care, housing services/placement
- Operating costs
- Maintenance



- Complete the CENST format
- Comply with 58.6
- Undertake project activities



Categorically Excluded Subject to 58.5 (CEST) Activities listed in 24 CFR 58.35(a)



- Rehabilitation SF/MF units



- Replace/ repair sewer/water lines

- Complete CEST format
- May require Request for Release of Funds & public notice 58.45 – 58.45 & Subpart H



Tiered Review

24 CFR 58.15



- Recurring residential rehabilitation activities in different locations during the **Consolidated Plan** period
- Use the tiered environmental review procedure

<http://portal.hud.gov/hudportal/HUD?src=/states/california/working/cpd/cae>



Tier 1 – Area wide review

Rehabilitation Environmental Review (RER 2014)

(Previous versions are obsolete)

[This RER tiered review format [per 24CFR §58.15] may only be used for the environmental review of the **rehabilitation of existing single-family residential structures**, per §58.35(a)(3)(i), with or without the acquisition and/or disposition of the existing structure per §58.35(a)(5). It may also be used for the acquisition/rehabilitation/disposition of individual units in a multi-family structure, but not for the rehabilitation/acquisition/disposition of an entire multi-family building per §58.35(a)(3)(ii), where environmental review using a Statutory Worksheet may be appropriate]. **It may not be used for projects involving changes in use or new construction activities.**

Program, project name, and description: (include maximum number of units and maximum grant/loan amounts)

From: (month/year)

To: (month/year)

Area of Consideration: (Define the geographic area from which applications for this rehabilitation program will be accepted. Attach a composite map showing target area and floodplains).

INSTRUCTIONS for completing the RER (2014)

- Must publish NOI RROF
- Submit Request for Release of Funds to HUD
- 58.45 – 58.45 & Subpart H

Tier 2 – Site specific review



U.S. Department of Housing and Urban Development
San Francisco Regional Office - Region IX
600 Harrison Street
San Francisco, California 94107-1387
www.hud.gov
espanol.hud.gov

APPENDIX A 2013

(Previous versions are obsolete)

Before an activity is approved, this **Appendix A** review must be successfully completed and kept in file for each residential structure proposed for acquisition/rehabilitation/disposition. The Appendix A may be used only in conjunction with a currently valid **RER** (Rehabilitation Environmental Review) for the target area. Completion of the Appendix A does not require the submission of an additional RROF/C (Request for Release of Funds/Certification-HUD 7015.15) if the Responsible Entity has received Authority to Use Grant Funds (HUD 7015.16) for the project.

Building and unit Address:

- Complete the Appendix A format as each site is identified for assistance. After completion:
- Assistance for the site may be approved/rehab undertaken/contracts signed

CoC Limited Scope of Review

- CoC Leasing only
- Without rehabilitation/new construction/acquisition
- Complete CoC Limited Scope Review format



Environmental Assessment - 24 CFR 58.36

Projects that are not
Exempt
or Categorically Excluded
per 58.34 or 58.35



- Complete the Environmental Assessment format, see 24 CFR 58.40
- Follow public notice and Request for Release of Funds at 24 CFR 58.43-58.46, Subpart H,
- Receive Authority to Use Grant Funds
- Begin project activities



Environmental Impact Statement



Environmental Impact Statement

- Activities listed in §58.37
- Complete the ER in accordance with
 - 24 CFR 58 Subparts F & G,
 - CEQ regulations 40 CFR 1500-1508,
 - NEPA
- Follow HUD's public notice and Request for Release of Funds at 24 CFR 58.43-58.46, Subpart H
- Receive Authority to Use Grant Funds
- Begin project activities



San Francisco Regional Office

Ernest Molins, Regional Env. Ofcr.

Telephone (415) 489-6731

Ernest.molins@hud.gov

[Join a Mailing List](#)

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FAQs](#)

[Ask an Environmental
Review Question](#)

[Contact HUD
Environmental Staff](#)

Field Environmental Officers

- Zach.R.Carter@hud.gov
(415) 489-6621
- Kathleen.A.McNulty@hud.gov
(415) 489-6644



Welcome to HEROS

The HUD Environmental Review Online System



What is HEROS?

- HEROS replaces HUD's current paper-based.
- HEROS walks users through the entire environmental review process from beginning to end

HUD Issued B/C ID		
Five Digit PIN (if no B/C ID)		
Last Name		
First Name		
RE Name		RE= Responsible Entity
State		
Phone Number		
Email Address		
DUNS Number		
Address		
Privileges	Preparer	
	Approver	
	Certifying Officer	
	HEROS Local Administrator	

Homes & Communities

U.S. Department of Housing
and Urban Development

HUD Environmental Review Online System (HEROS)

- [HEROS Home](#)
- [User Guide](#)



Community Planning & Development

HEROS Login

Please enter your Username (C*****, B*****, or H*****) and Password to log in.

Username:

Password:

You are accessing a U.S. Government information system. System usage may be monitored, recorded and subject to audit. Unauthorized use of this system is prohibited and subject to criminal and civil penalties. Use of this system indicates consent to monitoring and recording.

☐ I agree to Terms of Service agreement.

Login

HEROS Login and Dashboard

[HEROS Home](#)[Guide to HEROS](#)[My Environmental Reviews](#)[Reports ▾](#)[Admin](#)[Logout](#)

My Environmental Reviews (50/58)

HEROS integrates guidance and assistance into the environmental review format, but it is not a substitute for learning and understanding HUD's environmental review process and all environmental laws and authorities addressed in this system. Responsible Entities are urged to attend regular environmental trainings lead by HUD staff and ensure that they are familiar with all relevant environmental laws and authorities. HEROS users remain responsible for ensuring that their environmental review records are accurate and complete.

[Start a new environmental review](#)[Go to tiered reviews](#)

	Name of Project ▾ <input type="text"/>	City ▾ <input type="text"/>	State ▾ <input type="text"/>	Status ▾ <input type="text"/>	Level of Review ▾ <input type="text"/>	Last Updated ▾ <input type="text" value="MM/DD/YYYY"/>	Last Updated by ▾ <input type="text" value="kat"/>	ER ID ▾ <input type="text"/>	
<input type="checkbox"/>	Housing-rehabilitaion	Rockville	MD	Completed	CEST_CONV_EXEMP	Wed Jan 29 14:52:37 EST 2014	Kathryn Au	900000010000226	
<input type="checkbox"/>	Warren-Gardens	Alexandria	NH	In progress	EA	Wed Jan 29 11:55:55 EST 2014	Kathryn Au	900000010000202	
<input type="checkbox"/>	Rehab-of-Terrace-Apartments	Alexandria	VA	In progress	EA	Wed Jan 29 09:44:37 EST 2014	Kathryn Au	900000010000200	

[Edit selected environmental review](#)[View 7015.16 - Authority to Use Grant Funds](#)[View selected environmental review](#)

Defining the Project

[My Environmental Reviews](#) [Search](#) [Reports](#) [Admin](#) [Logout](#)

1105 - Initial Screen (50/58)

Project Name: Sample-Review

Environmental Review Record created on July 29, 2013 by Liz Zepeda

★ Indicates that field is required

★ **Project Name:**

★ **HUD Funding Source:**

Include *only* funding sources for which this review will fulfill HUD's environmental review (e.g. if this project receives funding from both

Grant/Project Number	HUD Program
CDBG123456	Community Planning and Development ▼

[Add Another Funding Source](#)

★ **Estimated Total HUD Funded Amount:** \$

★ **Estimated Total Project Cost:** \$

★ **Does this project anticipate the use of funds or assistance**

☒ No

☐ Yes

★ **Indicate the date that the environmental review process**

State / Local Identifier [optional]:

[My Environmental Reviews](#) [Search](#) [Reports](#) [Admin](#) [Logout](#)

1125 - Project Summary (50/58)

Project Name: Sample-Review

★ **Description of the Proposed Project [24 CFR 50.12; 24 CFR/ 58.32; 40 CFR 1508.25]:**

Provide a project description that captures the maximum anticipated scope of the proposal. It should include all contemplated actions which logically are, either geographically or functionally, a composite part of the project, regardless of the source of funding. Describe all physical aspects of the project, such as plans for multiple phases of development, size and number of buildings, and activities to be undertaken. Include details of the physical impacts of the project, including whether there will be ground disturbance. If applicable, indicate whether the project site will require acquisition or if the sponsor already has ownership.

★ **Project Location:**

Provide a street address or intersection for your project and validate the address using the button below. If the project affects a large area, such as an infrastructure or community services project, select a representative address or intersection and describe the project location in a narrative in the provided textbox. If the project type is sensitive, you may provide an alternative address, such as the address of your city hall or nonprofit in lieu of the exact location of the project. **If you cannot validate the address now, be sure to do so before completing the review.**

★ **Street:**

★ **City:**

★ **State:**

★ **Zip:**

[Validate Address](#)

Location Information:

[Map or photograph upload](#)

Determining Level of Review

1311 –Level of Review (58)

Project Name: Post-office-acquisition

What level of review is required?

☐ **Exempt**

Select appropriate citation(s) from:

- ☐ Environmental and other
- ☐ Information and financial
- ☐ Administrative and mana
- ☐ Public services that will
- ☐ prevention, child care, he
- ☐ Inspections and testing o
- ☐ Purchase of insurance. 2
- ☐ Purchase of tools. 24 CF
- ☐ Engineering or design co
- ☐ Technical assistance an
- ☐ Assistance for temporary
- ☐ necessary only to contro
- ☐ 58.34(a)(10)
- ☐ Payment of principal and

☐ **Categorical exclusion not s**

Select appropriate citation(s) from:

- ☐ Tenant-based rental ass
- Supportive services inclu

* What activities are involved in the project? (Check all that apply.)

- ☐ Acquisition (including refinance) of real property
- ☐ Leasing ⓘ
- ☐ Maintenance ⓘ
- ☒ Repair/Improvement/Rehabilitation
- ☐ New construction/Reconstruction
- ☐ Demolition
- ☐ Disposition
- ☐ Removal of architectural barriers
- ☐ Soft Costs ⓘ or other non-physical activities (e.g. planning, services, administration, predevelopment costs)

* Will the project require or lead to a change in land use of the affected property (e.g. from non-residential to residential, industrial use to another)?

- ☐ Yes
- ☒ No

* What is the planned use of the affected property (after completion of the project)?

- ☐ Vacant land
- ☐ Public facility
- ☐ Nonresidential building(s)
- ☒ Residential building(s) ⓘ

Performing Analysis (Summary)

HEROS version uat-1887-28631

HUD Environmental Review Online System (HEROS)

HEROS Home

Guide to HEROS

Initial Screen

Project Summary

Level of Review
Determination

Project Justification

Related Laws and
Authorities

Environmental
Assessment Factors

Environmental
Assessment Analysis

Mitigation Measures and
Conditions

Environmental Finding
Package

Signature and Posting

NOI-RROF

RROF (7015.15)

AUGF (7015.16)

Complete and Archive

My Environmental Reviews Reports ▼ Admin Logout

2005 – Related Federal Laws and Authorities Summary (50/58)

Project Name: Sample-Review

Directions: Click on the Compliance Factor links in the first column in the chart below. The links will take you to a separate screen to answer questions and provide documentation on the specific Compliance Factor. After completing each Compliance Factor screen you will automatically return to this screen to continue.

Compliance Factors	Are formal compliance steps or mitigation required?	Compliance Determinations
STATUTES, EXECUTIVE ORDERS, AND REGULATIONS LISTED AT 24 CFR §50.4 & 58.6		
Airport Hazards [Clear Zones and Accident Potential Zones; 24 CFR Part 51 Subpart D]	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	The project site is not within 15,000 feet of a military airport or 2,500 feet of a civilian airport. The project is in compliance with Airport Hazards requirements.
Coastal Barrier Resources [Coastal Barrier Resources Act, as amended by the Coastal Barrier Improvement Act of 1990 [16 USC 3501]]	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	This project is not located in a CBRS Unit. Therefore, this project has no potential to impact a CBRS Unit and is in compliance with the Coastal Barrier Resources Act.
Flood Insurance [Flood Disaster Protection Act of 1973 and National Flood	<input type="checkbox"/> Yes <input type="checkbox"/> No	The structure or insurable property is located in a FEMA-designated Special Flood Hazard Area. The community is participating in the National Flood Insurance Program. For loans, loan insurance or guarantees, the amount of flood insurance coverage must at least equal the outstanding principal balance of the loan or the maximum limit of coverage made available under the National Flood Insurance Program, whichever is less. For

Performing Analysis (Mitigation)

My Environmental Reviews Reports ▾ Admin Logout

5000 - Mitigation Measures and Conditions (50/58)

Project Name: Sample-Review

Before proceeding with this screen, review to ensure that you have completed all preceding screens. The mitigation measures and conditions below are generated from information provided in the Law and Authority and EA Factor screens, so it is important that all previous screens be finalized before continuing.

Review the mitigation measures and conditions required of this project below.

Law, Authority, or Factor	Mitigation Measure or Condition
Flood Insurance	For loans, loan insurance or guarantees, the amount of flood insurance coverage must at least equal the outstanding principal balance of the loan or the maximum limit of coverage made available under the National Flood Insurance Program, whichever is less. For grants and other non-loan forms of financial assistance, flood insurance coverage must be continued for the life of the building irrespective of the transfer of ownership. The amount of coverage must at least equal the total project cost or the maximum coverage limit of the National Flood Insurance Program, whichever is less.
Farmlands Protection	The project will be modified to mitigate negative impacts to important farmland in the following ways...

If no mitigation measures are required, you may continue to the next page ⑥. Otherwise, describe the Mitigation Plan below.

Mitigation Plan

Explain how the above mitigation measures and conditions will be carried out and monitored. Clearly identify both the persons responsible for implementing and monitoring mitigation measures and the timeframe in which they will be completed. These measures and conditions must be incorporated into project contracts, development agreements and other relevant documents. (40 CFR 1505.2(c))

Finalizing the Review (RROF/C)

7015.15 - Request for Release of Funds and Certification

Project Name: Fairview-Housing-Project

This form is to be used by Responsible Entities and Recipients (as defined in 24 CFR 58.2) when requesting the release of funds, and requesting the authority to use such funds, for HUD programs identified by statutes that provide for the assumption of the environmental review responsibility by units of general local government and States. Public reporting burden for this collection of information is estimated to average 36 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

Upload the notice to the public in accordance with 24 CFR 58.70 [here](#). If all required users are not able to complete this form within HEROS at this time, you may upload a completed 7015.15 form [here](#) as well.

Upload

Part 1. Program Description and Request for Release of Funds (to be completed by Responsible Entity)

1. Program Title(s):

Community Development Block Grants (CDBG) (Entitlement)

2. HUD/State Identification Number: CDBG123

3. Recipient Identification Number (optional):

4. OMB Catalog Number(s) : 

5. Name and address of Responsible Entity:

DENVER
City and County Of Denver
Denver
Colorado
80202

Finalizing the Review (AUGF)

7015.16 – Authority to Use Grant Funds

Project Name: Fairview-Housing-Project-

Do not complete this screen until all appropriate waiting periods have elapsed.

Were any objections received to releasing the funds?

☐ Yes

☒ No

If yes, upload objections received and the response:

Upload

If all required users are not able to complete this form within HEROS at this time or if this review requires the approval of both HUD and a state agency

form here:

Upload

To: (Name & address of Grant Recipient & name & title of Chief Executive Officer)

City and County Of Denver
ROOM 350
Denver
Colorado
80202-5337

Copy To: (name & address of SubRecipient)

We received your Request for Release of Funds and Certification, form HUD-7015.15 on:

Your Request was for HUD/State Identification Number: CDBG123

Program Activity/Project Description

PROJECT DESCRIPTION

ER is ready for

Environmental Review Record



U. S. Department of Housing and Urban
Development
451 Seventh Street, SW
Washington, DC 20410
www.hud.gov
espanol.hud.gov

Environmental Review for Activity/Project that is Categorically Excluded Subject to Section 58.5 Pursuant to 24 CFR Part 58.35(a)

Project Information

Project Name: Fairview Project

HEROS Number: 900000010000555

Responsible Entity (RE): Denver, Colorado

RE Preparer: John Doe

State / Local Identifier: Denver12345

Certifying Officer: Jane Smith

Grant Recipient (if different than Responsible Entity): N/A

Point of Contact:

Consultant (if applicable): N/A

Point of Contact:

Project Location: 123 Main Street, Denver, CO 80217

Additional Location Information:

The project site is a 3 acre lot at the northwest corner of Main Street and 1st Street.

Direct Comments to: Denver Environmental Staff
123 City Hall Blvd
Denver, Colorado 80266

Description of the Proposed Project [24 CFR 50.12 & 58.32; 40 CFR 1508.25]:

The proposed project consists of constructing 5 units of new multifamily housing on the vacant lot at the site described above, and also yada yada yada.

Fairview Project

Denver, Colorado

900000010000555

Maps, photographs, and other documentation of project location and description:

[900000010000555_sitemap.docx](#)

[900000010000555_sitephoto.JPG](#)

Determination:

	This project converts to Exempt, per §58.34(a)(12) because there are no circumstances which require compliance with any of the federal laws and authorities cited at §58.5
✓	This project cannot convert to Exempt because there are circumstances which require compliance with one or more federal laws and authorities cited at §58.5.
	Extraordinary circumstances exist and this project may result in significant environmental impact. This project requires preparation of an Environmental Assessment (EA).

Approval Documents:

[900000010000555_RROF.pdf](#)

[900000010000555_publicnotice.docx](#)

7015.15 certified by Certifying Officer on: 2/20/2014

7015.16 certified by Authorizing Officer on: 3/15/2015

Funding Information

Grant Number	HUD Program	Program Name	Funding Amount
CDBG12345	CPD	CDBG	\$1,000,000

Estimated Total HUD Funded Amount: \$1,000,000.00

Estimated Total Project Cost [24 CFR 58.2 (a) (5)]: \$2,000,000.00

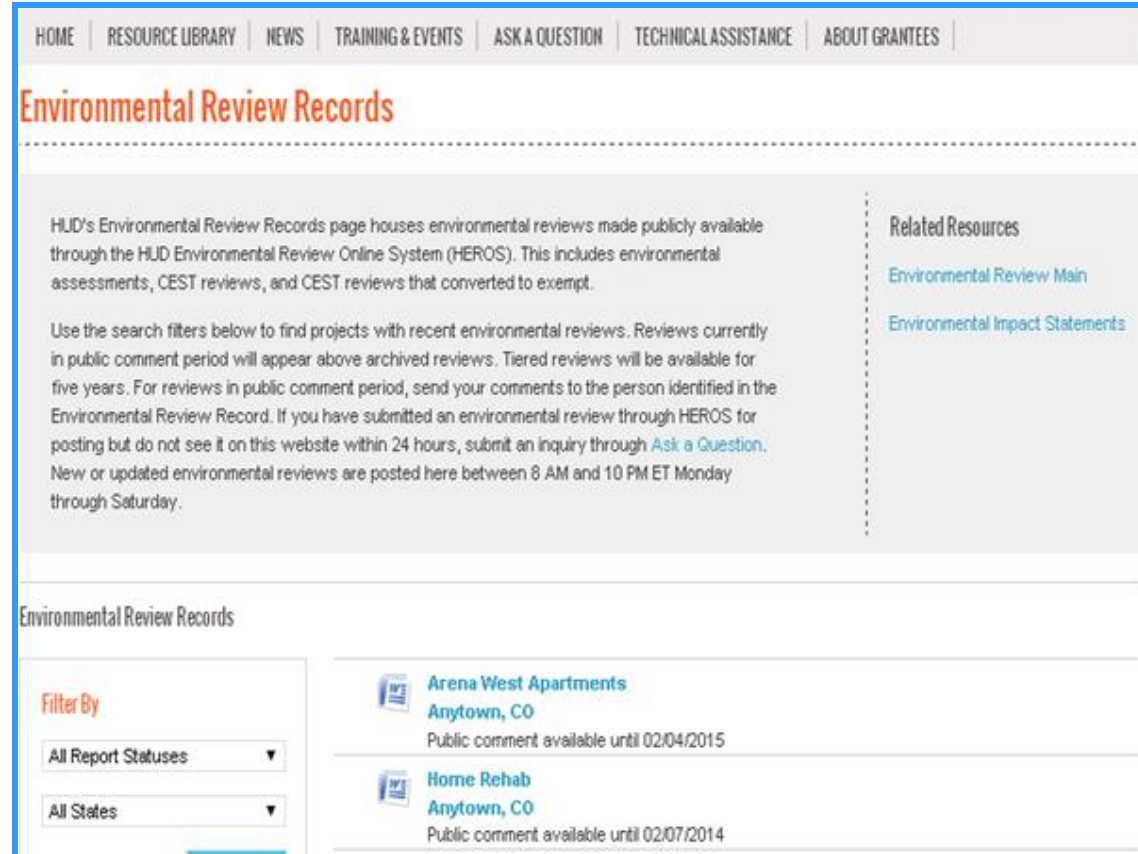
Compliance with 24 CFR §50.4, §58.5 and §58.6 Laws and Authorities

Compliance Factors: Statutes, Executive Orders, and Regulations listed at 24 CFR §50.4, §58.5, and §58.6	Are formal compliance steps or mitigation required?	Compliance determination (See Appendix A for source determinations)
STATUTES, EXECUTIVE ORDERS, AND REGULATIONS LISTED AT 24 CFR §50.4 & § 58.6		
Airport Hazards		The project is in an Accident Potential Zone (APZ), however, the project is consistent with DOD
Clear Zones and Accident	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Posting to the HUD Exchange Website

Reviews will be posted during public comment periods.

Completed reviews will be archived on HUD Exchange for a year for standard reviews and 5 years for tiered reviews



The screenshot shows the HUD Environmental Review Records website. At the top is a navigation bar with links: HOME, RESOURCE LIBRARY, NEWS, TRAINING & EVENTS, ASK A QUESTION, TECHNICAL ASSISTANCE, and ABOUT GRANTEES. Below the navigation bar is the title "Environmental Review Records" in orange. The main content area has two columns. The left column contains text explaining that HUD's Environmental Review Records page houses environmental reviews made publicly available through the HUD Environmental Review Online System (HEROS). It includes environmental assessments, CEST reviews, and CEST reviews that converted to exempt. It also provides instructions on how to use search filters to find projects with recent environmental reviews. The right column is titled "Related Resources" and contains links for "Environmental Review Main" and "Environmental Impact Statements". Below the main content area is a section titled "Environmental Review Records" which includes a "Filter By" section with two dropdown menus: "All Report Statuses" and "All States". To the right of the filters is a list of two projects: "Arena West Apartments" in "Anytown, CO" with a public comment period available until 02/04/2015, and "Home Rehab" in "Anytown, CO" with a public comment period available until 02/07/2014.

HOME | RESOURCE LIBRARY | NEWS | TRAINING & EVENTS | ASK A QUESTION | TECHNICAL ASSISTANCE | ABOUT GRANTEES

Environmental Review Records

HUD's Environmental Review Records page houses environmental reviews made publicly available through the HUD Environmental Review Online System (HEROS). This includes environmental assessments, CEST reviews, and CEST reviews that converted to exempt.

Use the search filters below to find projects with recent environmental reviews. Reviews currently in public comment period will appear above archived reviews. Tiered reviews will be available for five years. For reviews in public comment period, send your comments to the person identified in the Environmental Review Record. If you have submitted an environmental review through HEROS for posting but do not see it on this website within 24 hours, submit an inquiry through [Ask a Question](#). New or updated environmental reviews are posted here between 8 AM and 10 PM ET Monday through Saturday.

Related Resources



- [Environmental Review Main](#)
- [Environmental Impact Statements](#)

Environmental Review Records

Filter By

All Report Statuses ▼

All States ▼

	Arena West Apartments Anytown, CO Public comment available until 02/04/2015
	Home Rehab Anytown, CO Public comment available until 02/07/2014

Training Materials

- Training materials for HEROS include:
 - User Guide
 - Video e-tutorials
 - Live Q&A webinars -
 - Region IX Q&A - late Fall/early Winter
- Materials are available at:

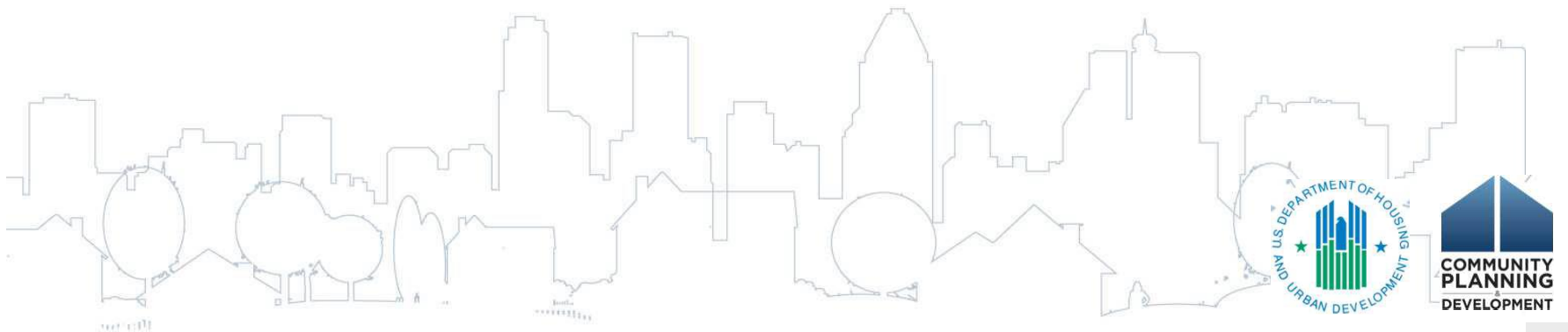
<https://www.hudexchange.info/environmental-review/heros>

Questions

- Submit questions through Ask a Question on the HUD Exchange site at <https://www.hudexchange.info/get-assistance/my-question/>
- For questions on this presentation, email sfcpd@hud.gov

Thank you!

Office of Inspector General



U.S. Department of Housing and Urban Development



Office of Inspector General

James Brady, ARIGA
HUD-OIG Office of Audit
Region 9

OVERVIEW



- Introductions
- Role of OIG
 - Office of Audit/Office of Investigation
- OIG process
 - Audit/Investigation
- Most common issues...
 - Audit/Investigation
- Audit resolution process
- How you can help...

Role of OIG



The IG Act of 1978, as amended, 5 United States Code (U.S.C.) App. 3, provides for the statutory establishment of the HUD Office of Inspector General.

We are a resource for HUD, Congress and the American Public to ensure integrity, efficiency and effectiveness of HUD programs and activities.

Role of OIG



We are authorized to:

- Access to all records and information of HUD and Program Participants;
- Conduct audits and criminal investigations;
- Issue subpoenas for records and documents;

Role of OIG



- Conduct and supervise independent audits, fraud reviews, evaluations, and civil and criminal investigations;
- Promote integrity, economy, efficiency, and effectiveness in HUD programs and operations; and
- Prevent and detect fraud and abuse in such programs and operations.

Divisions of OIG



- Office of Audit
 - Internal reviews of HUD programs.
 - External reviews of program participants.
- Office of Investigations
 - Primarily deals with criminal matters.
- Joint Civil Fraud Division
 - Comprised of Audit and Investigative personnel to pursue civil action against program participants.

What OIG Reviews



- OIG is responsible for auditing and investigating all HUD programs and activities
 - Single Family – Lenders
 - Multifamily – project owners, management agents, contractors, and developers
 - CPD – cities, counties, nonprofit entities, and contractors
 - Public and Indian Housing – housing authorities, nonprofit entities

Primary Reasons for an OIG Visit



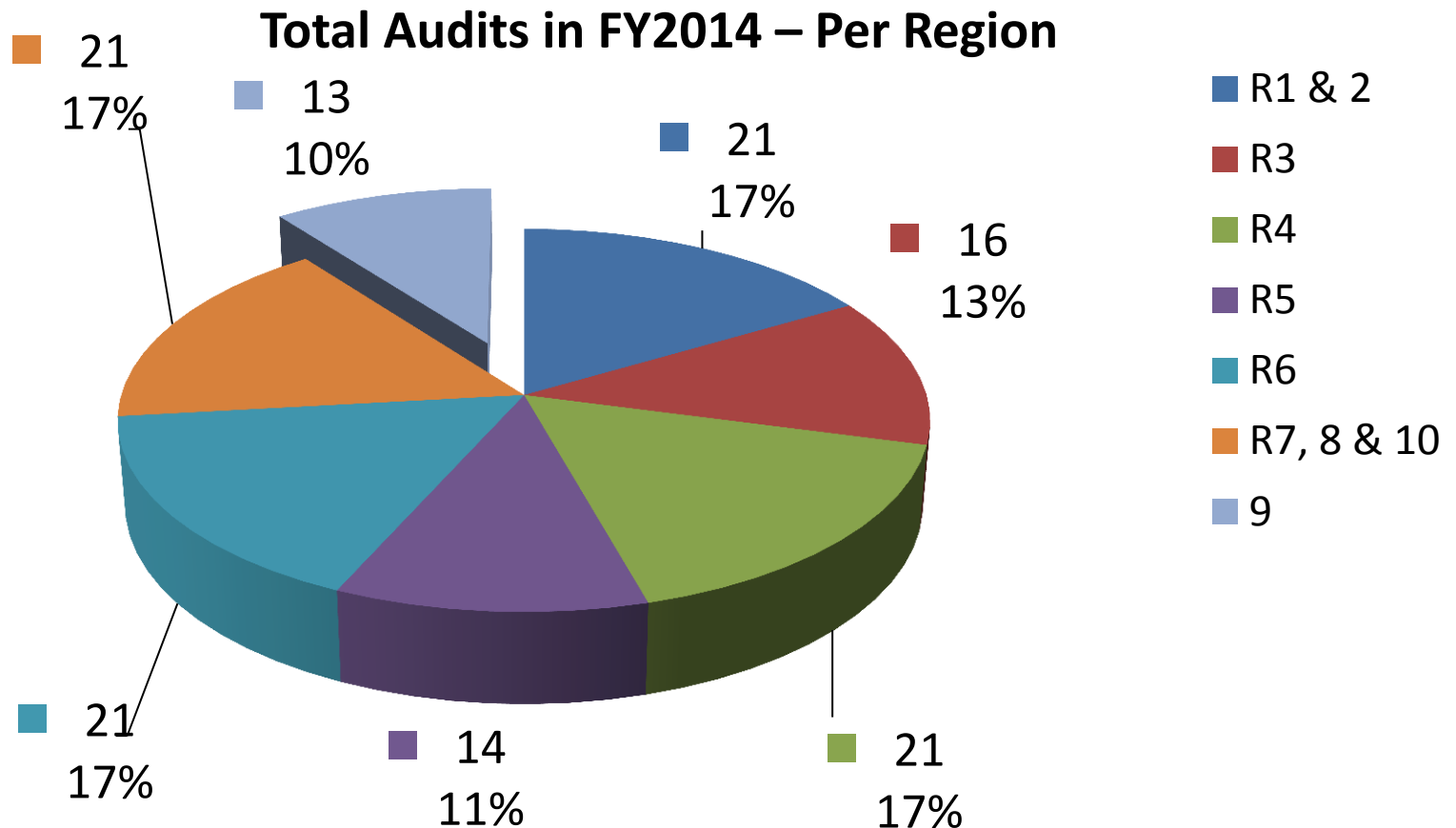
- Request from Congress or a HUD Program Office
- Complaint from an outside party or employee
- Part of an internal audit of HUD operations
- Our own internal analysis

Role of the Office of Audit



- Office of Audit is comprised of about 300 auditors nationwide.
- Region 9 has 25 auditors, with staff in:
 - Los Angeles (regional office)
 - Las Vegas
 - Phoenix
 - San Francisco

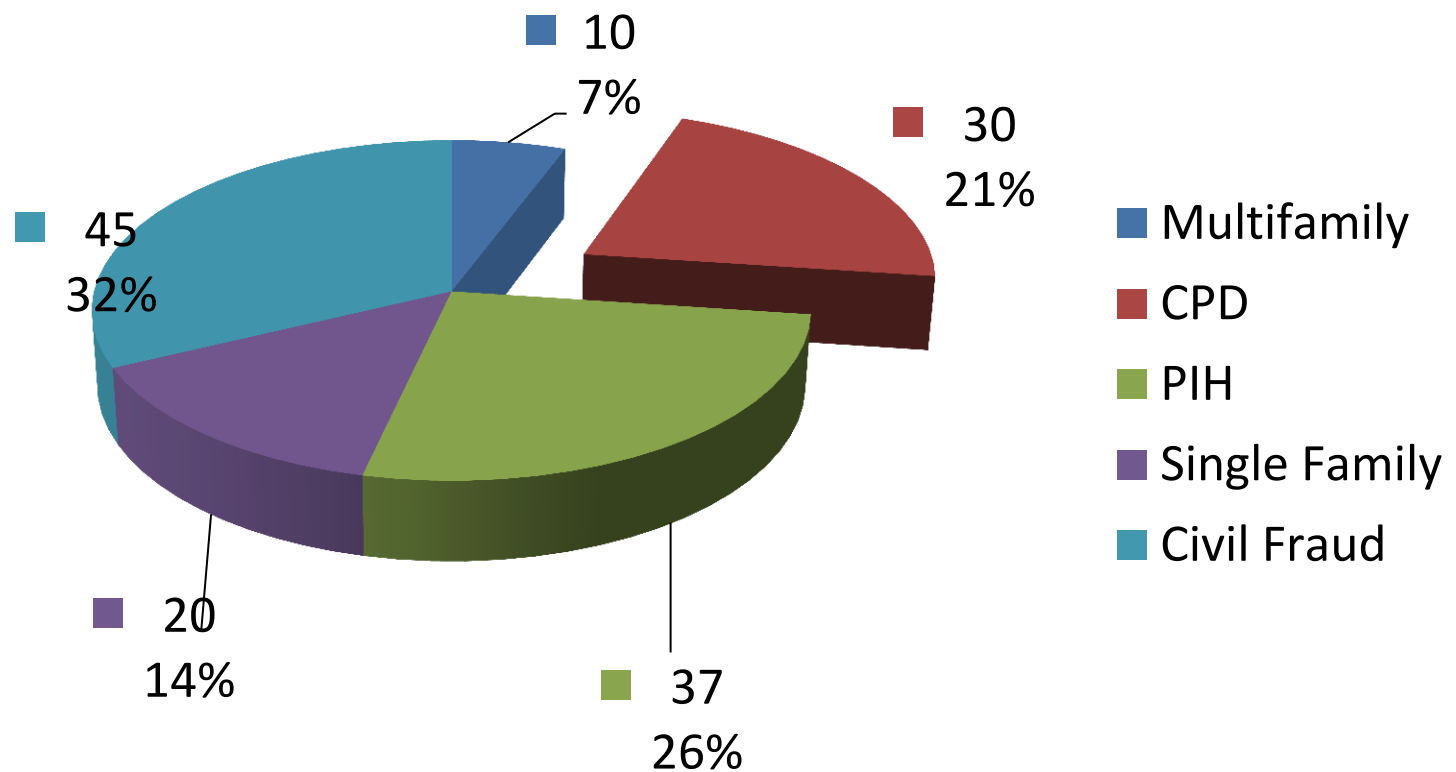
Office of Audit - Workload



Office of Audit - Workload



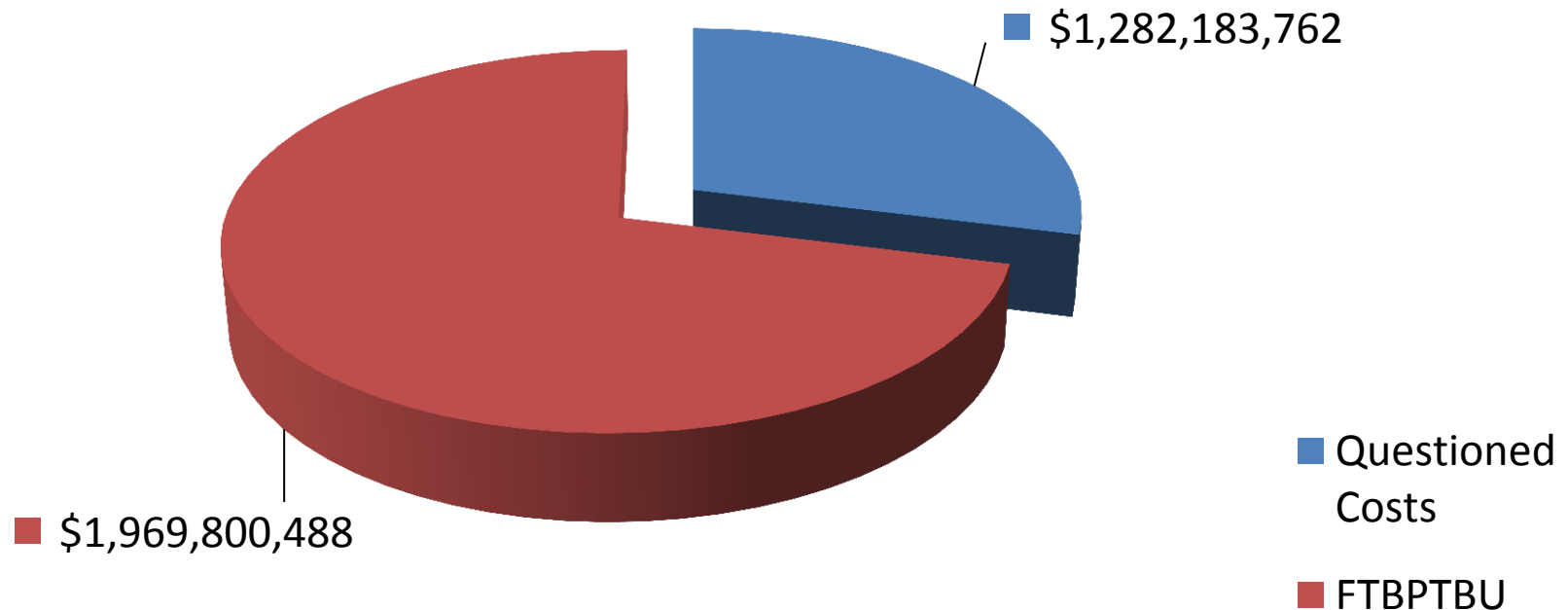
Total Audits in FY2014 – Per Program



Office of Audit - Workload



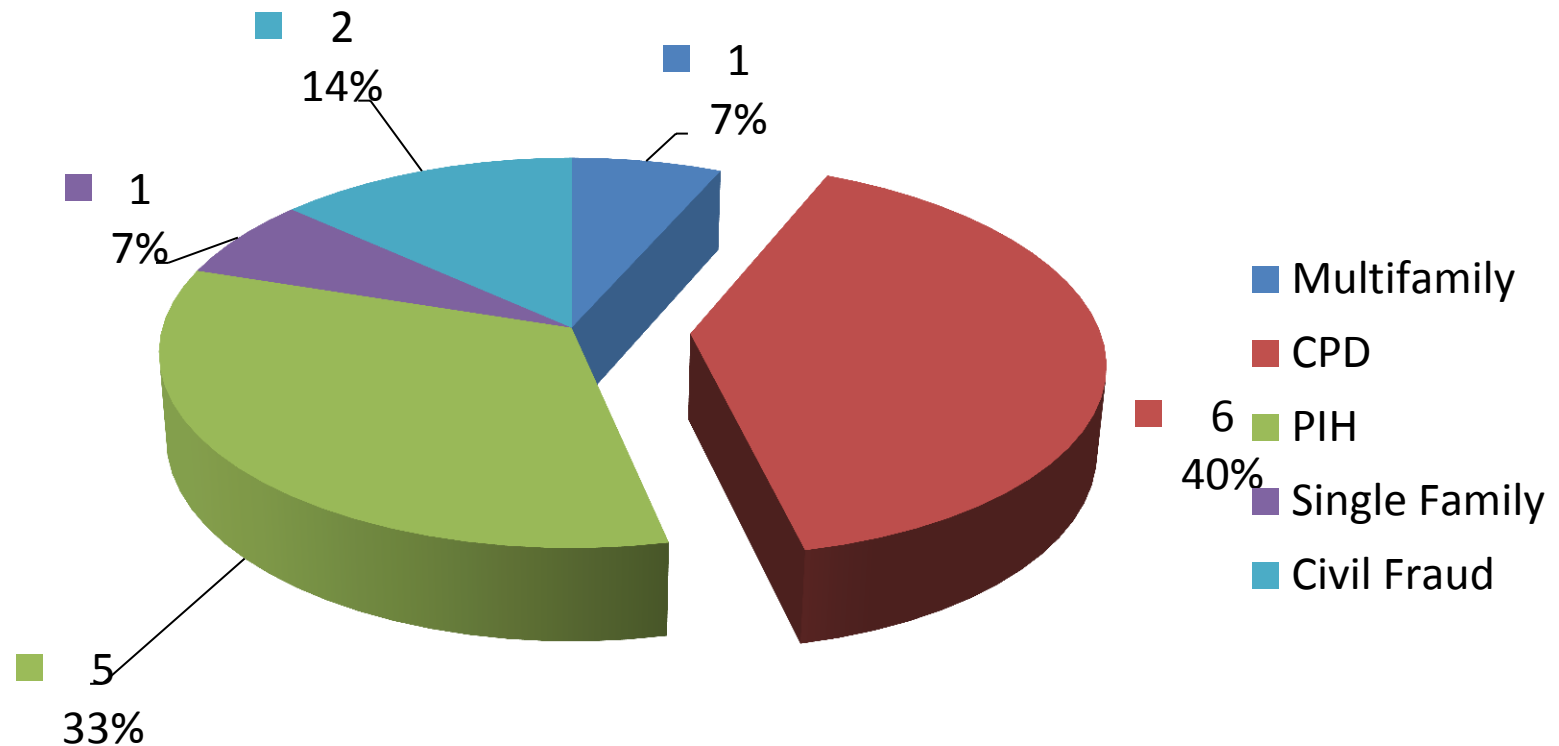
FY2014 FTBPTBU & Questioned Costs - Nationwide



Office of Audit - Workload



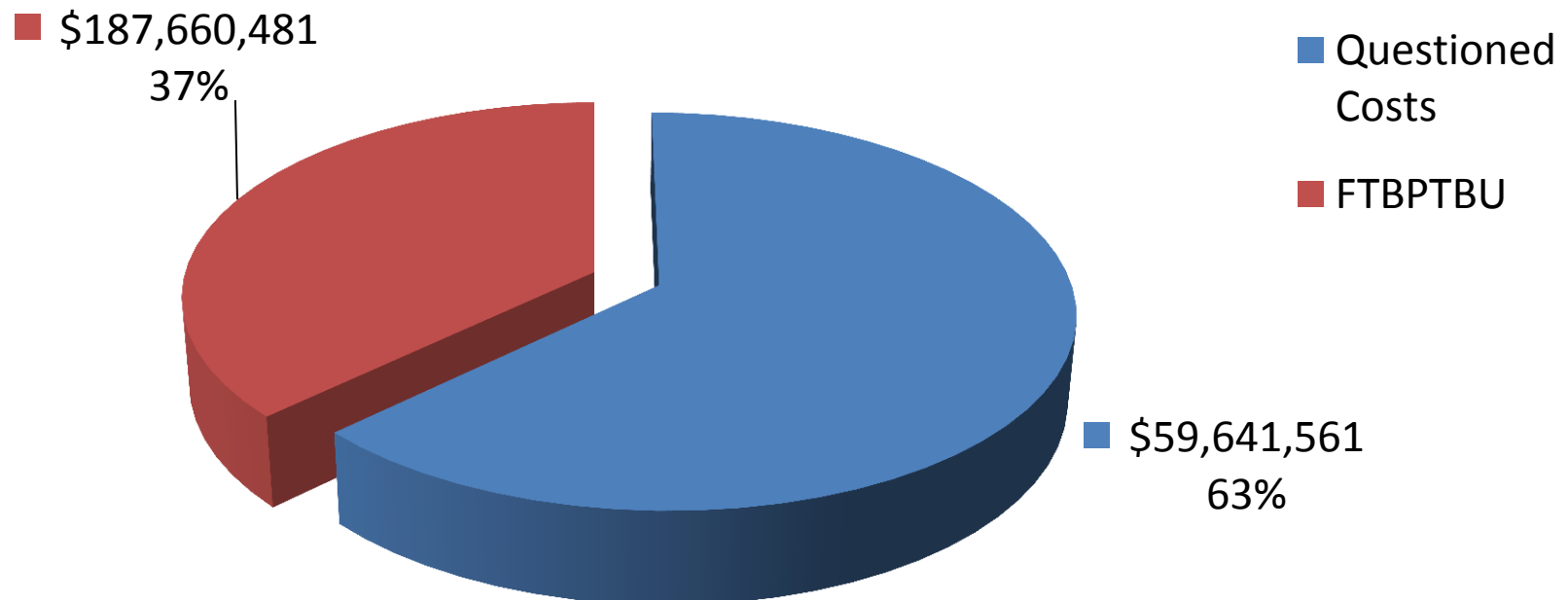
Region 9 Audits in FY2014 – Per Program



Office of Audit - Workload



FY2014 FTBPTBU & Questioned Costs – Region 9



Audit Process – Office of Audit



- Audit Planning – Policy
 - HUD OIG is to maintain an active audit plan that is responsive to management needs and provides for appropriate coverage of HUD program areas and management challenges.
 - Focus resources on areas of greatest benefit and risk to our customers and stakeholders.

Audit Process – Office of Audit



- Notification of Audit
- Entrance Conference
- Survey
- Go/No Go Decision
- Audit Fieldwork
- Reporting Phase

Audit Process – Office of Audit



- Conducting Audits
 - Assignment Planning: Notifying Officials of the Audit Assignment
 - OIG's policy to provide written notification of audit assignments to the auditee and the affected HUD program offices for **all external and internal assignments**.
 - The audit notification letter will include the assignment title, name and telephone number of an OIG contact, a requested entrance conference date, general details about the audit objectives, scope, and timing of the audit.

Audit Process – Office of Audit



- Conducting Audits
 - Survey Phase
 - Generally lasts about 6 weeks.
 - General overview/preliminary look at the auditee's operations, procedures and control.
 - The survey is a process for **quickly** gathering information on an organization, program, activity, or function to satisfy the general audit objective without performing detailed audit verification.

Audit Process – Office of Audit



- Conducting Audits
 - Assignment Planning: Go/No Go Decision
 - The survey is directed at identifying areas of materiality and sensitivity; identifying key aspects and features of the entity or program targeted for audit; and disclosing controls and areas that are susceptible to error, illegal acts, or abuse.

Audit Process – Office of Audit



- Conducting Audits
 - Assignment Planning: Audit
 - If survey results call for an audit, a more in-depth review with emphasis on areas identified during the survey will be conducted.
 - Auditee and HUD are informed about the audit phase of the assignment.
 - Audit usually lasts about six months, but may be extended if needed.

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Findings are **based on facts** established by evidence developed according to GAGAS to answer the audit objectives.
 - A finding is a logical extension of the fieldwork performed in response to the audit program.
 - Elements of findings
 - Condition
 - Criteria
 - Effect
 - Cause
 - Other Factors

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Elements of findings – Condition
 - Condition is a situation that exists as determined and documented during the audit.
 - **Example:** The City of Main Street did not monitor HOME expenditures in accordance with HUD rules and requirements.

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Elements of findings - Criteria
 - Criteria are the laws, regulations, contracts, grant agreements, standards, measures, expectations of what should exist, defined business practices, and benchmarks against which performance is compared or evaluated.
 - Criteria provide a context for evaluating evidence and understanding the results of the audit.
 - Criteria cited is specific to the condition.
 - **Example:** 24 CFR 85.40(a), Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments...

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Elements of findings – Cause
 - The cause identifies the reason or explanation for the condition or the factor responsible for the difference between the situation that exists (condition) and the required or desired state (criteria).
 - The cause may also serve as a basis for recommendations for corrective actions.
 - Common factors include poorly designed policies, procedures, or criteria; inconsistent, incomplete, or incorrect implementation; or factors beyond the control of program management.
 - Identifying the cause of problems can assist in making constructive recommendations for correction.

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Elements of findings – Cause
 - Because problems can result from a number of plausible causes, the recommendation should clearly demonstrate and explain with evidence and reasoning the link between the problems and the identified causes.
 - Significant deficiencies in internal controls may be the cause of deficient performance.
 - For a finding on an external entity, auditors must isolate those causes are isolated to within the control of the audited entity.
 - When HUD actions are a contributing cause for a deficiency, a separate internal report or memorandum is sent to the HUD action official.

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Elements of findings – Cause
 - Causes are usually tied to specific individual(s) associated with the condition.
 - **Example:** This condition occurred because the city compliance officer failed to monitor subgrantee's incurred expenses to ensure compliance with HUD rules and requirements.

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Elements of findings - Effect
 - Effect is also known as impact.
 - The effect is a clear logical link to establish the impact or potential impact of the difference between the situation that exists (condition) and the required or desired state (criteria).
 - The effect or potential effect identifies the outcomes or consequences of the condition.
 - **Example:** As a result, the City incurred \$2.6 million in funds to be put to better use towards eligible HOME activities. The City's inability to commit and expend funds in accordance with HUD requirements prevented it from meeting activity objectives that included providing homelessness assistance, home rehabilitations, and affordable housing to eligible participants.

Audit Process – Office of Audit



- Conducting Audits
 - Communicating Audit Results
 - Questioned Costs
 - Ineligible costs
 - Unsupported costs
 - Unnecessary/unreasonable costs

How You Can Help...



- Be proactive in preventing fraud, waste, and abuse.
- Provide information and assistance to OIG during reviews and investigations.
- Assist in the audit resolution process as early as possible.
- Become familiar with all policies and procedures that relate to the program, reviews, investigations and resolution process.
- Open and continuous communication with CPD
- Thoroughly review and question everything that does not appear clear to the average person.
- Document, Document, Document.

Questions

For answers to your questions,
email larry.wuerstle@hud.gov



Thank you for participating in the
San Francisco
CPD All Grantee Meeting!

